Employee Self Service

Created on Thursday, September 11, 2008

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My Personal Information

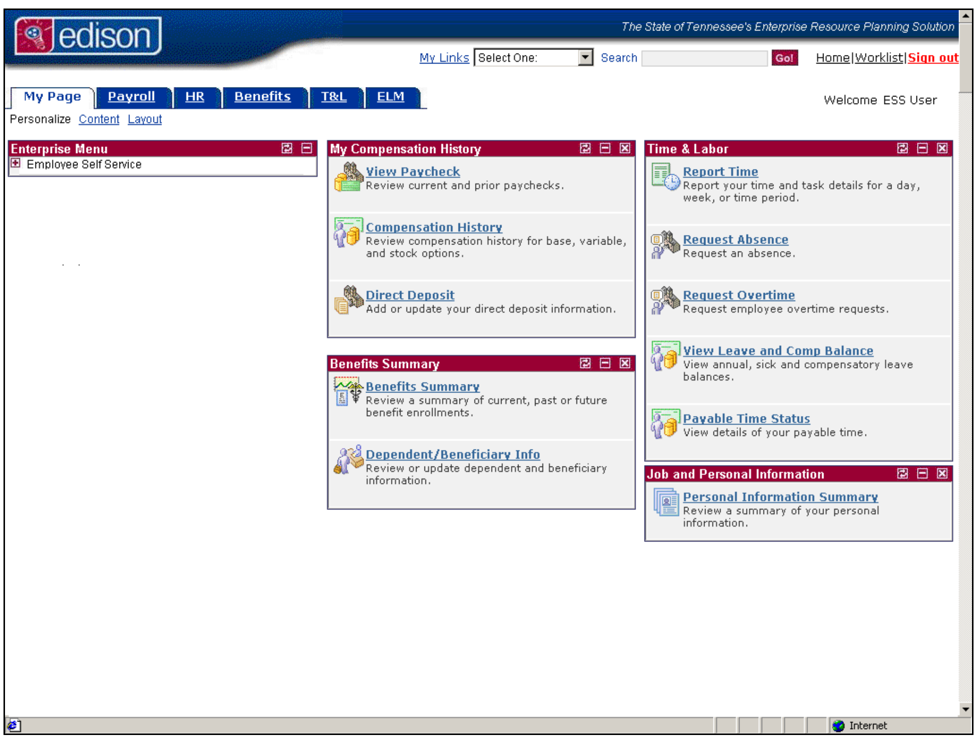
Address - View & Update

Employees may view and update their home address using Self-Service. The home address is the address used for payroll mailings, benefit mailings and benefit insurance eligibility determination. All home address must have a valid “plus four” zip code. If an invalid address is entered, the employee will receive a warning message containing tips on what can be done to correct this error.

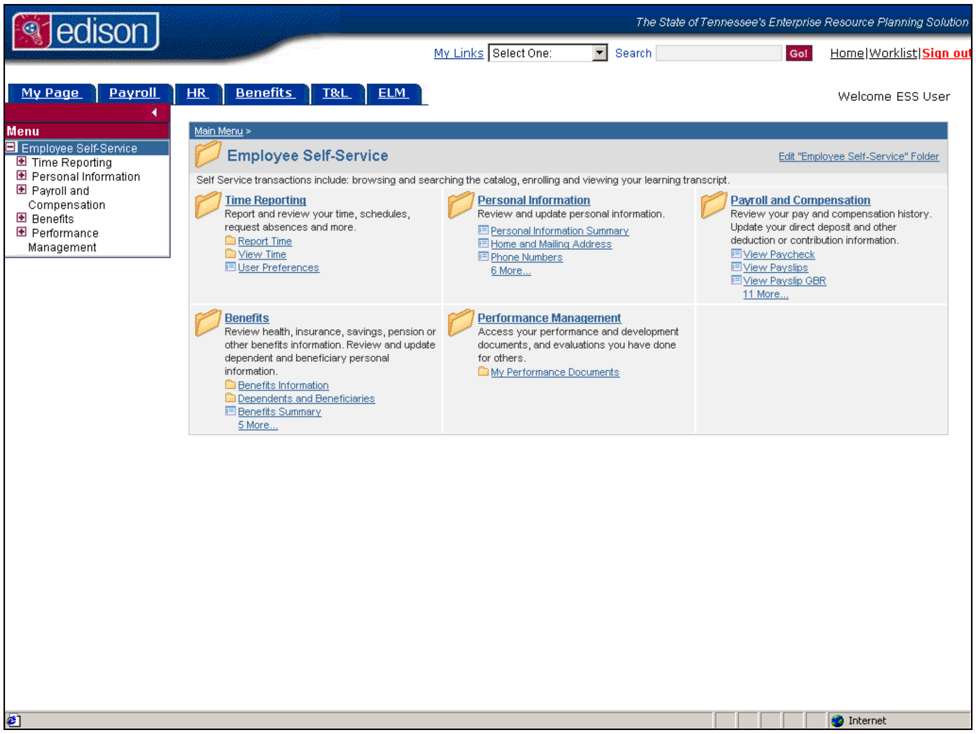
Procedure

In this lesson, you will learn how to update a **Home Address**.

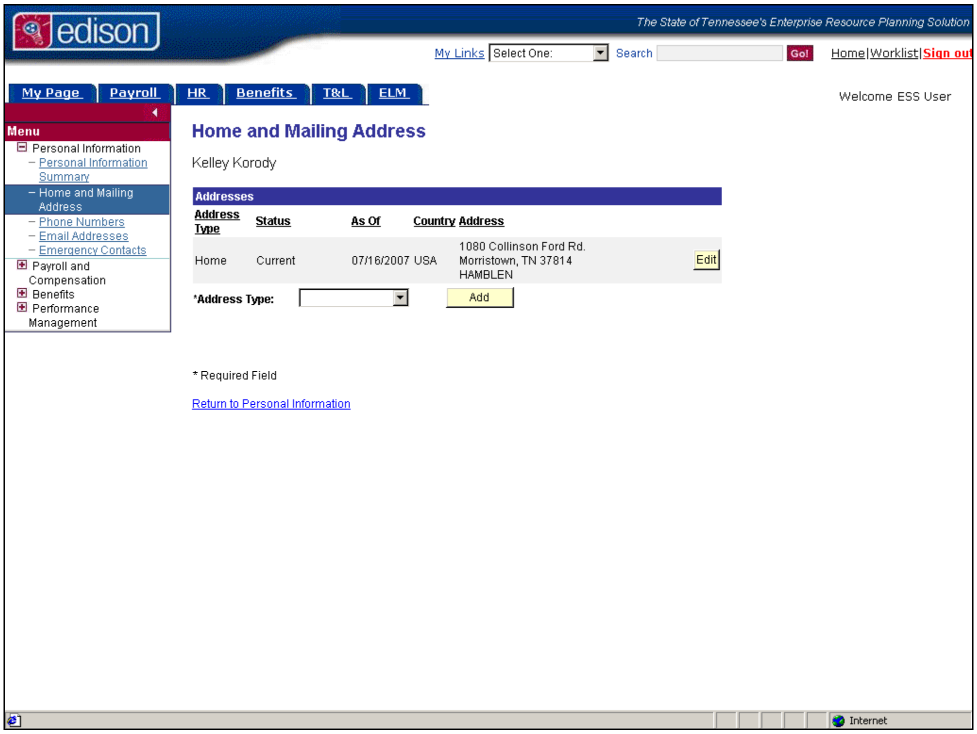
Kelley Korody will be used as an example in this lesson.

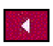


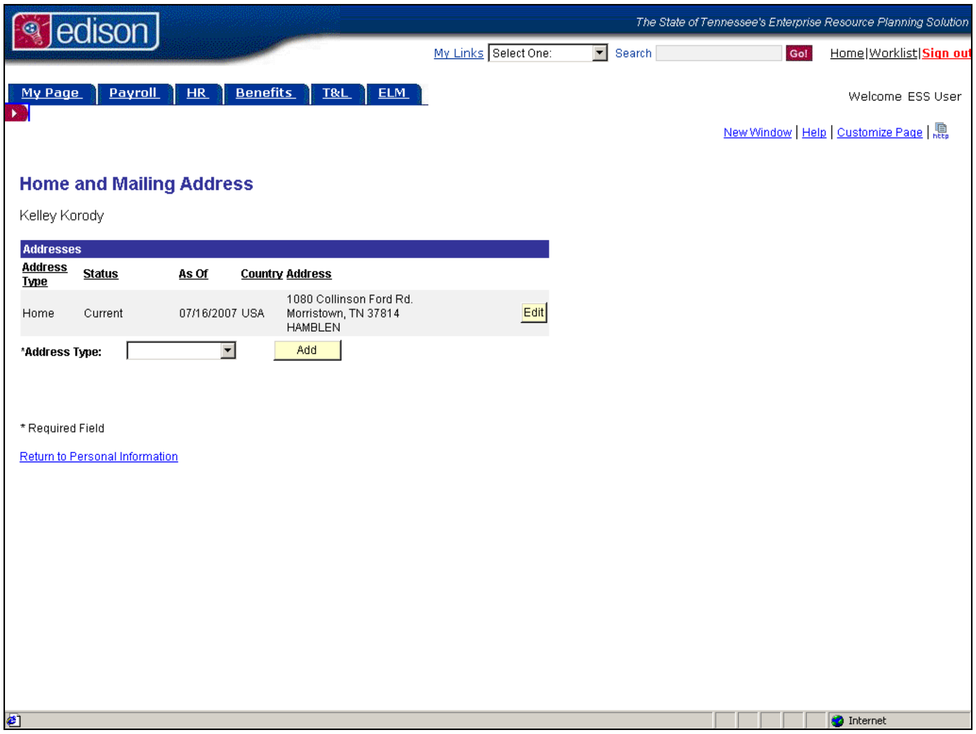
Step	Action
1.	Begin by clicking the **Employee Self Service** link. Employee Self Service



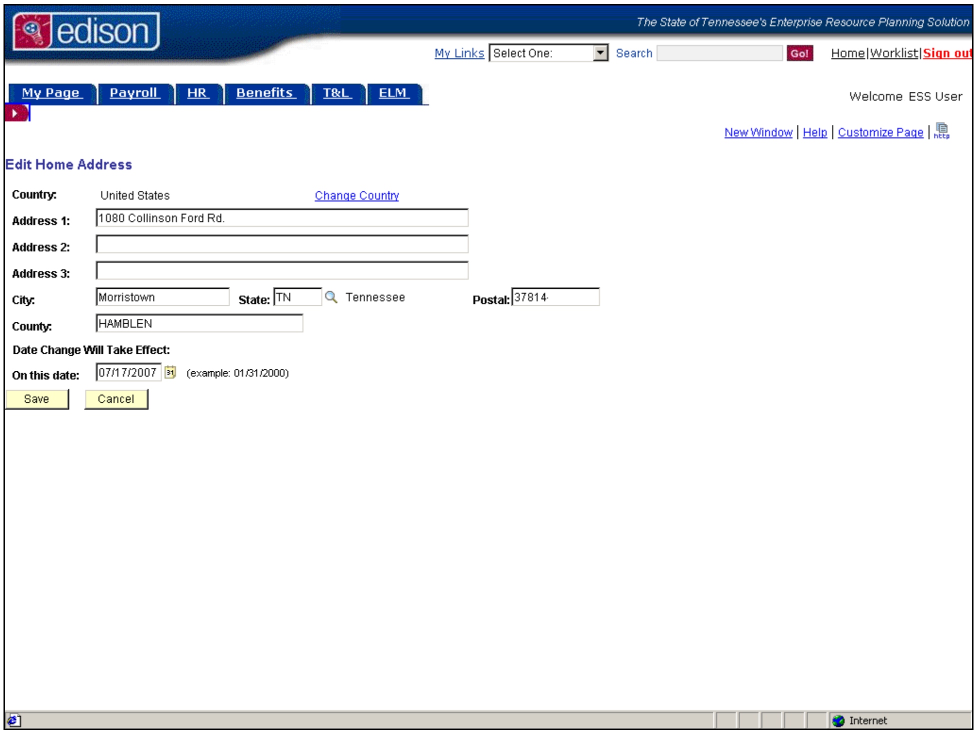
Step	Action
2.	Click the **Personal Information** link. Personal Information
3.	Click the **Home and Mailing Address** link. Home and Mailing Address

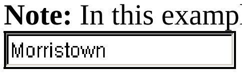
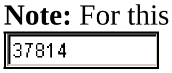
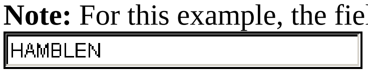


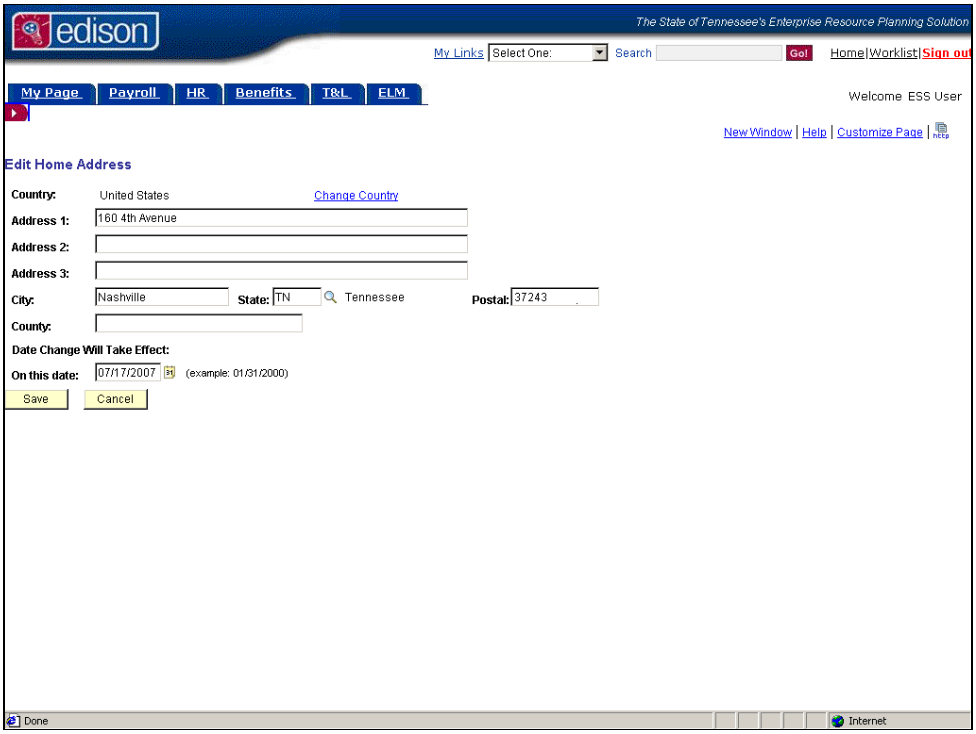
Step	Action
4.	Click the **Collapse** button to enlarge the screen 
5.	On the **Home and Mailing Address** page, the system displays all addresses currently stored in the Edison system. This employee only has one address stored in the Edison system.
6.	The **Address Type** refers to the type of address, such as: Home or Mail. The **Address Type** displayed on the screen is **Home**.
7.	At this time, Edison will be using the information in the **Address Type** of **Home** for mailing purposes.
8.	The **Address Status** refers to the status of the address. The status displayed is **Current**.



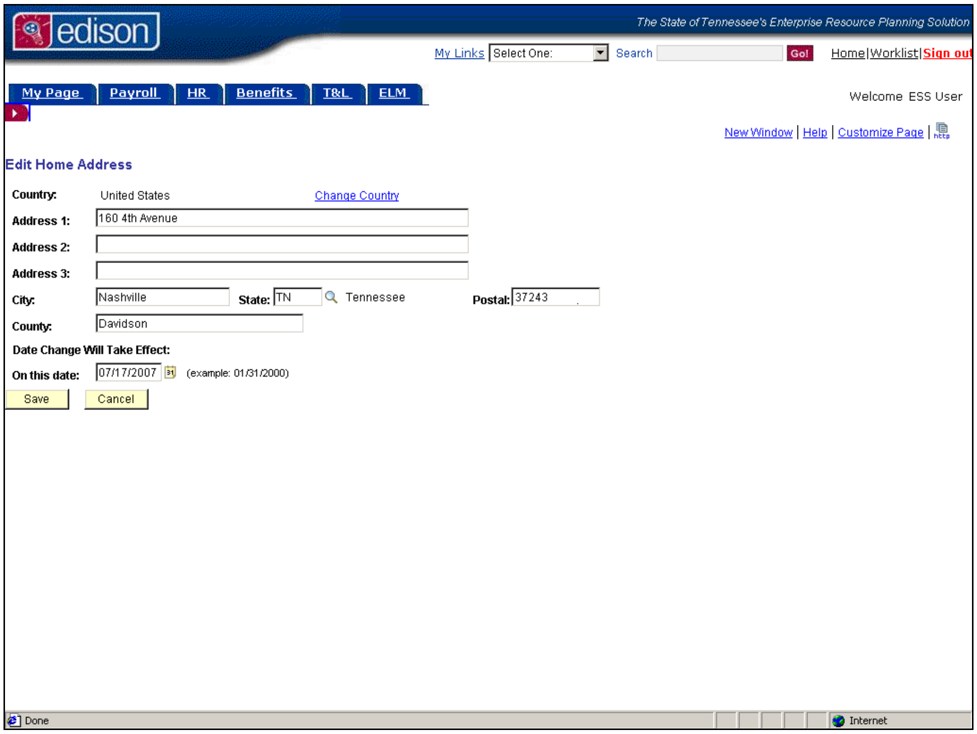
Step	Action
9.	Click the **Edit** button to update the current Home address. 

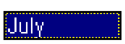


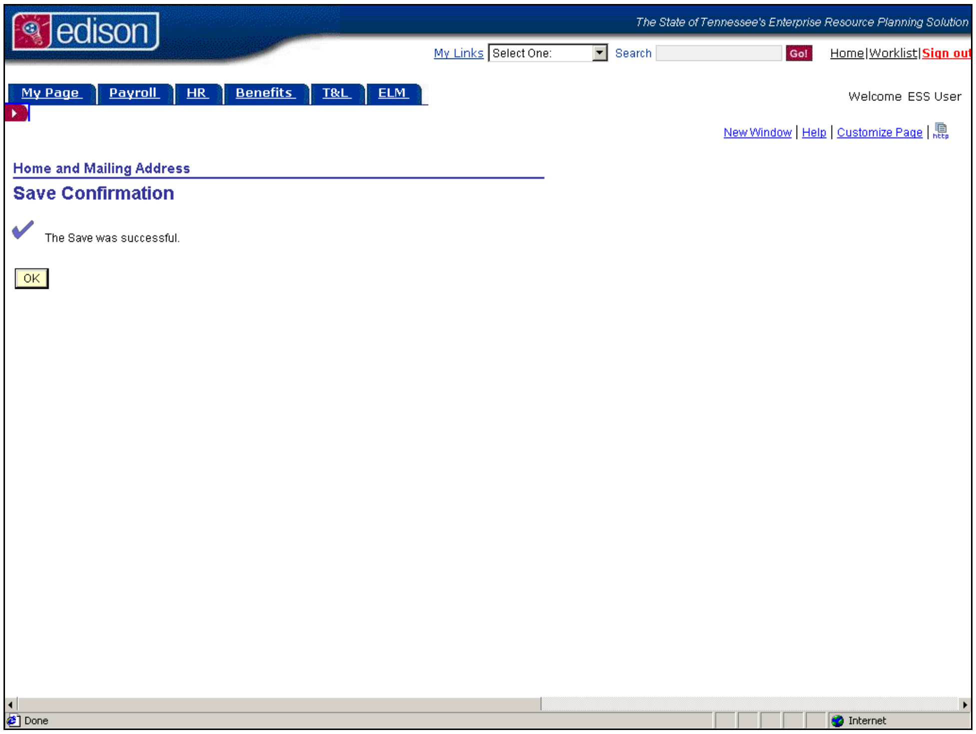
Step	Action
10.	Click in the **Address 1** field. **Note:** In this example, the field will automatically clear once selected.
11.	Enter "**160 4th Avenue**" into the **Address 1** field.
12.	Click in the **City** field. **Note:** In this example, the field will automatically clear once selected. 
13.	Enter "**Nashville**" into the **City** field.
14.	Since the state value is not changing, leave the **State** field as TN.
15.	Click in the **Postal** field. **Note:** For this example, the field will be cleared once you click into it. 
16.	Enter **37243** into the **Postal** field.
17.	Click in the **County** field. **Note:** For this example, the field will be cleared once you click into it. 



Step	Action
18.	Enter **Davidson** into the **County** field.
19.	Edison will automatically populate the current date as the default date in the **On this date** field. This is the date that the address change will become effective. To make the address change effective immediately, leave the **On this date** field unchanged. The date may be changed or modified if needed.



Step	Action
20.	Click the **Choose a date** button. 
21.	Click the **Month** drop down list. 
22.	Click the **July** list item. 
23.	Click the **31** link. 
24.	Click the **Save** button. 



Step	Action
25.	Click the **OK** button. 
26.	You have successfully completed updating the **Home Address**. **End of Procedure.**

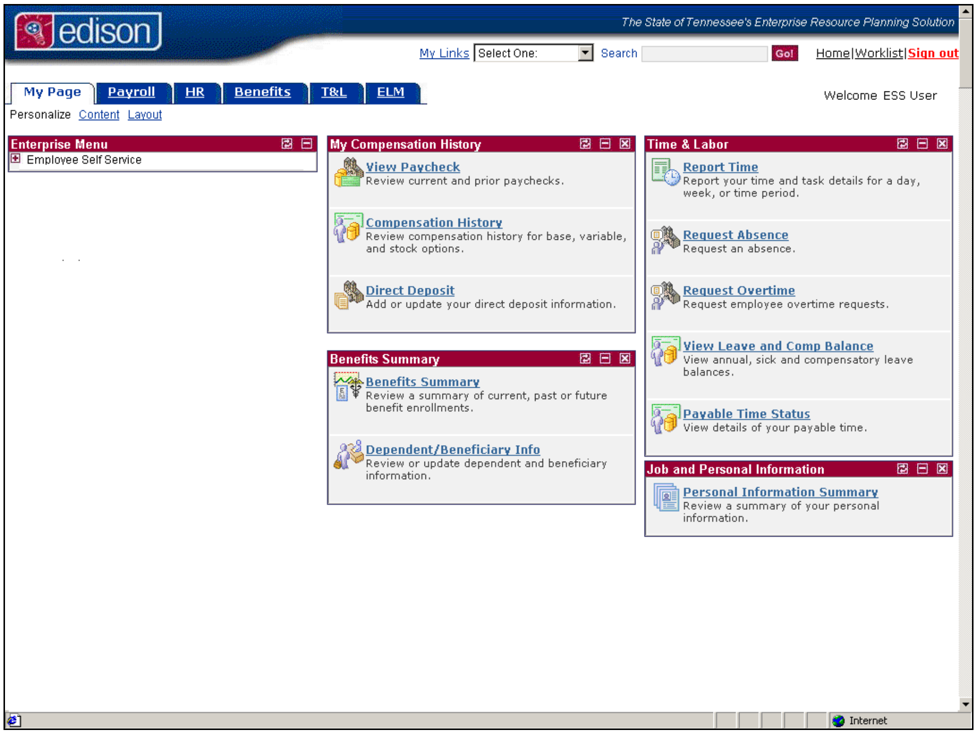
Email Address - View, Update & Add

Employees may add/update their email address using Self-Service. Employees may enter one or more email address and designate the address type for each. If more than one address is recorded, the employee can designate one as the "primary" email address.

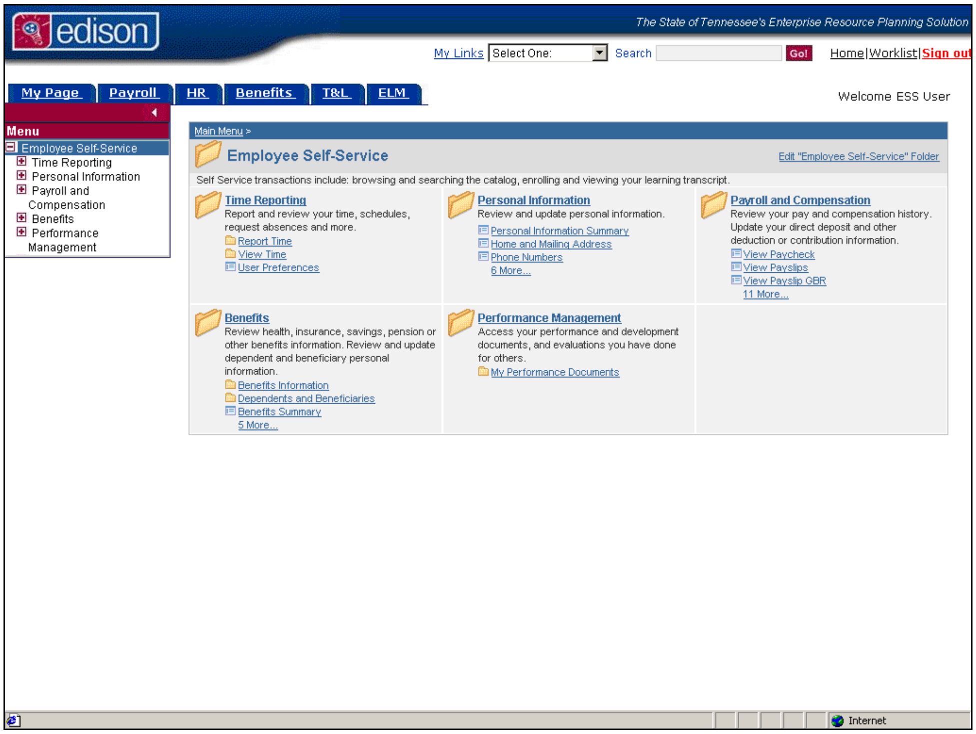
Procedure

In this lesson, you will learn how to view, update, and add an **Email Address**.

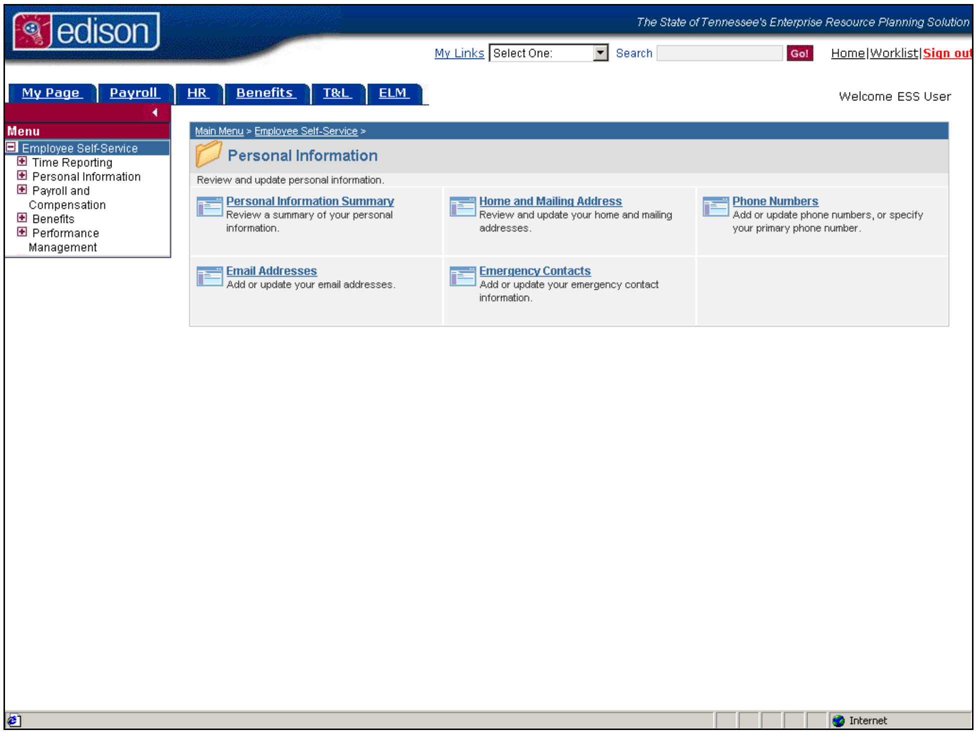
Kelley Korody will be used as an example in this lesson.



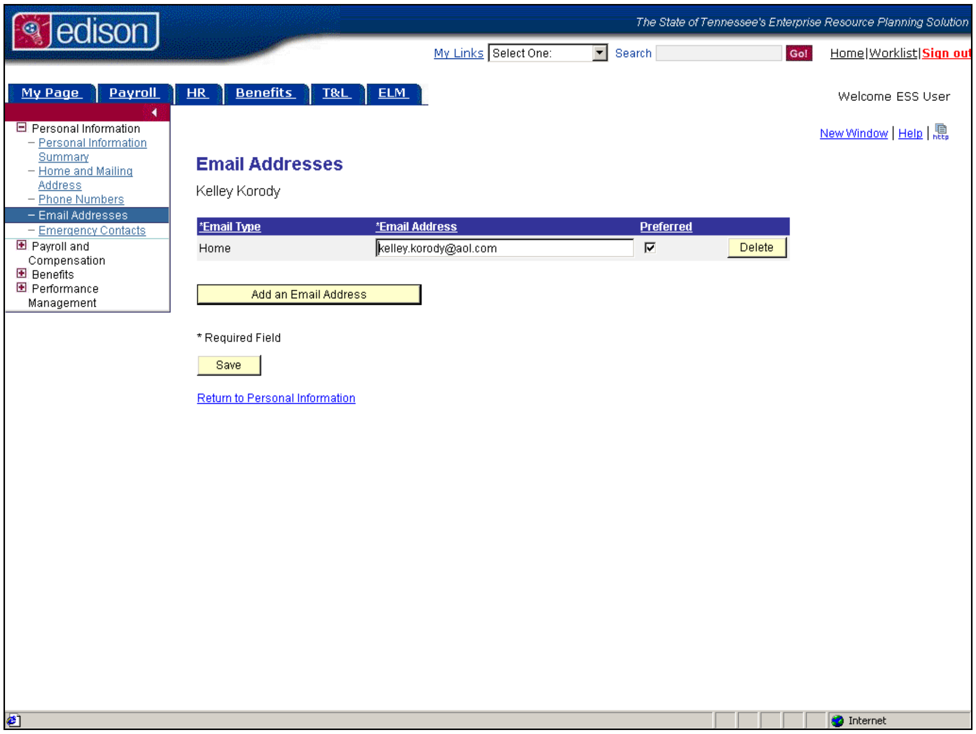
Step	Action
1.	Begin by clicking the **Employee Self Service** link. Employee Self Service



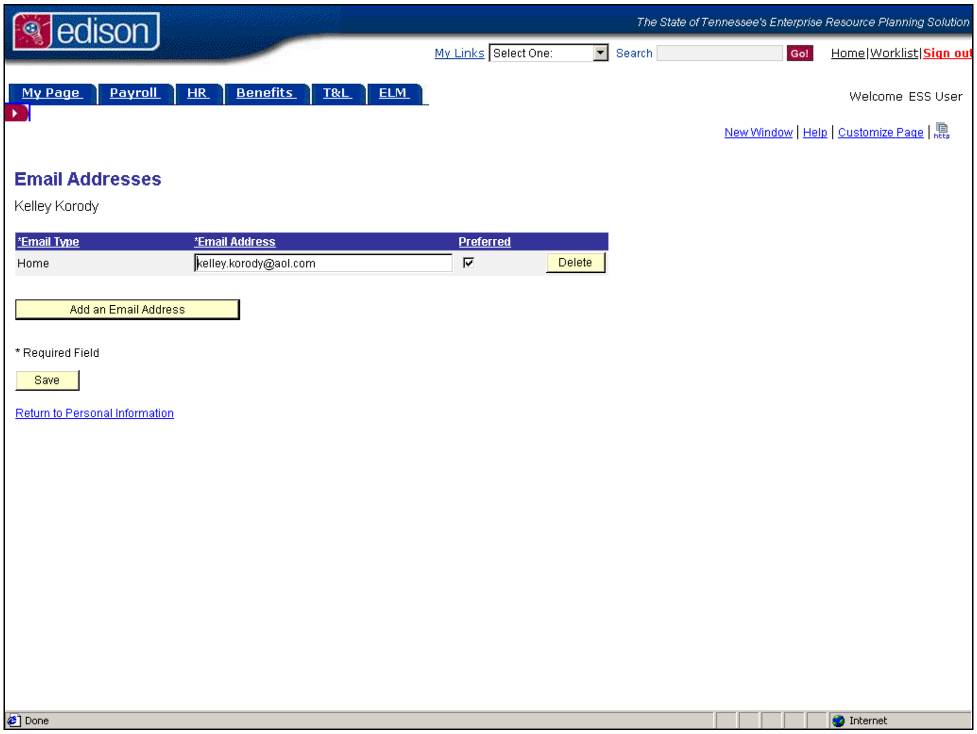
Step	Action
2.	Click the **Personal Information** link. 

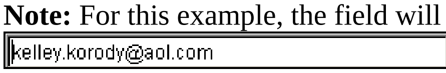


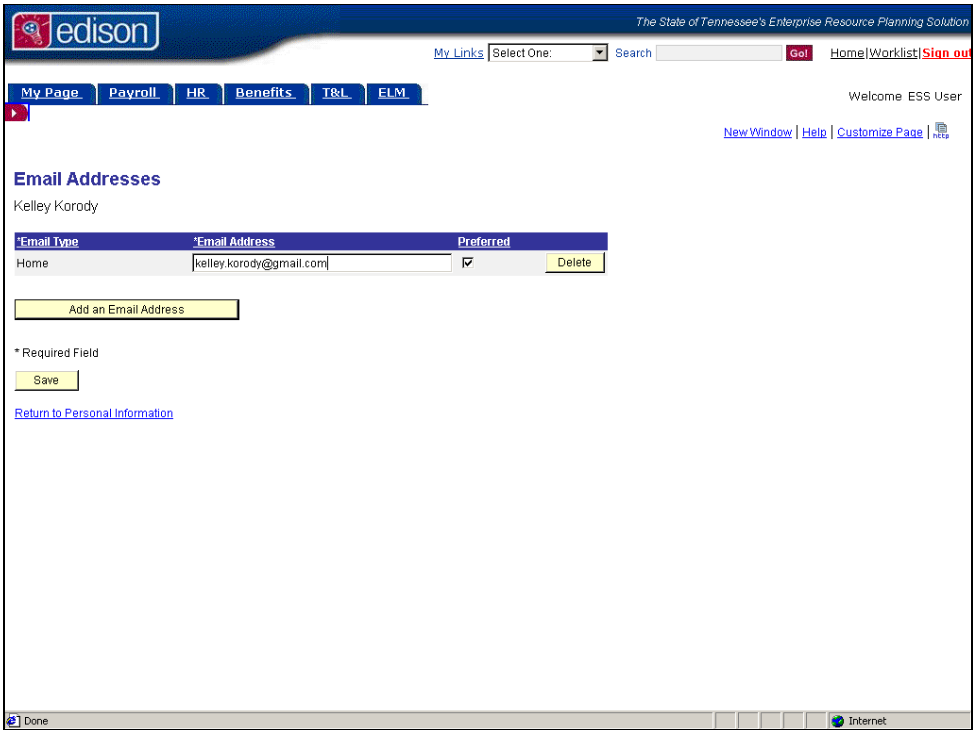
Step	Action
3.	Click the **Email Addresses** link. Email Addresses



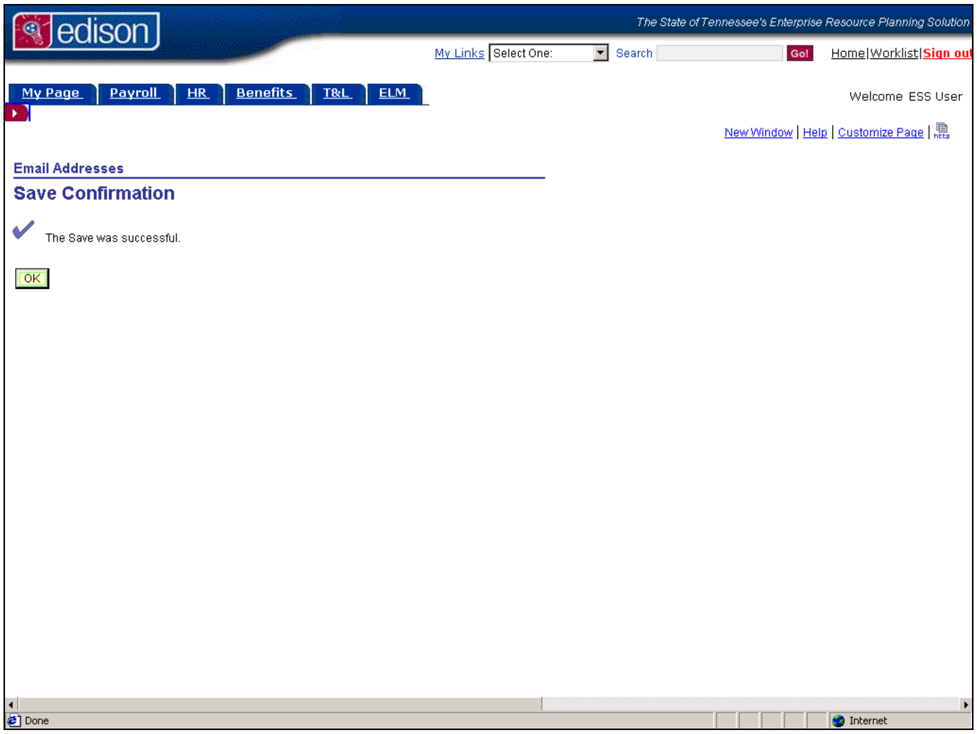
Step	Action
4.	Click the **Collapse** button to enlarge the screen. 



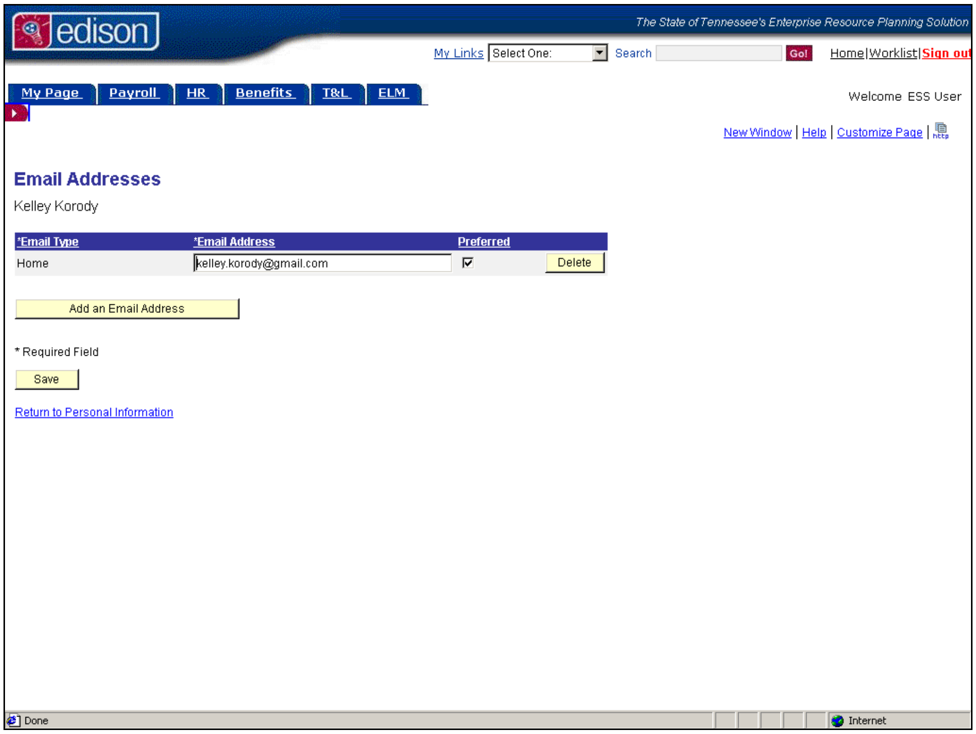
Step	Action
5.	In this example, Kelley needs to update her home **Email Address**. Click in the **Email Address** field. **Note:** For this example, the field will be cleared once you click into it. 
6.	Enter the desired information into the **Email Address** field. Enter "**kelley.korody@gmail.com**".
7.	In the event that the State of Tennessee would need to email an employee, the **Preferred** checkbox indicates which email address the employee would like the State to email first. If additional email addresses are added, the **Preferred** option can be changed to the appropriate email address. **Note:** An employee can have only one **Preferred** email address.



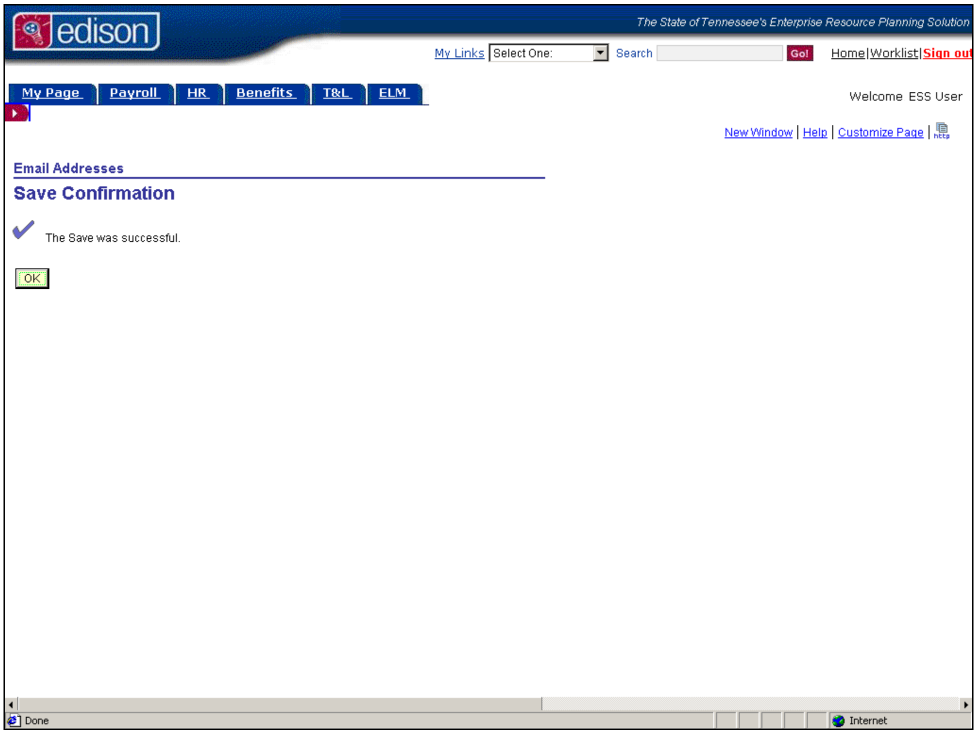
Step	Action
8.	Click the **Save** button. Save



Step	Action
9.	Click the **OK** button. 



Step	Action
10.	Now let's add Kelley's business **Email Address** to Edison. Click the **Add an Email Address** button. Add an Email Address
11.	Click the **Email Type** drop down list.
12.	Click the **Business** list item. Business
13.	Click in the **Email Address** field.
14.	Enter "**kelley.korody@state.tn.us**" into the **Email Address** field.
15.	Click the **Save** button. Save



Step	Action
16.	Click the **OK** button. 
17.	You have successfully completed viewing, updating, and adding an **Email Address**. **End of Procedure.**

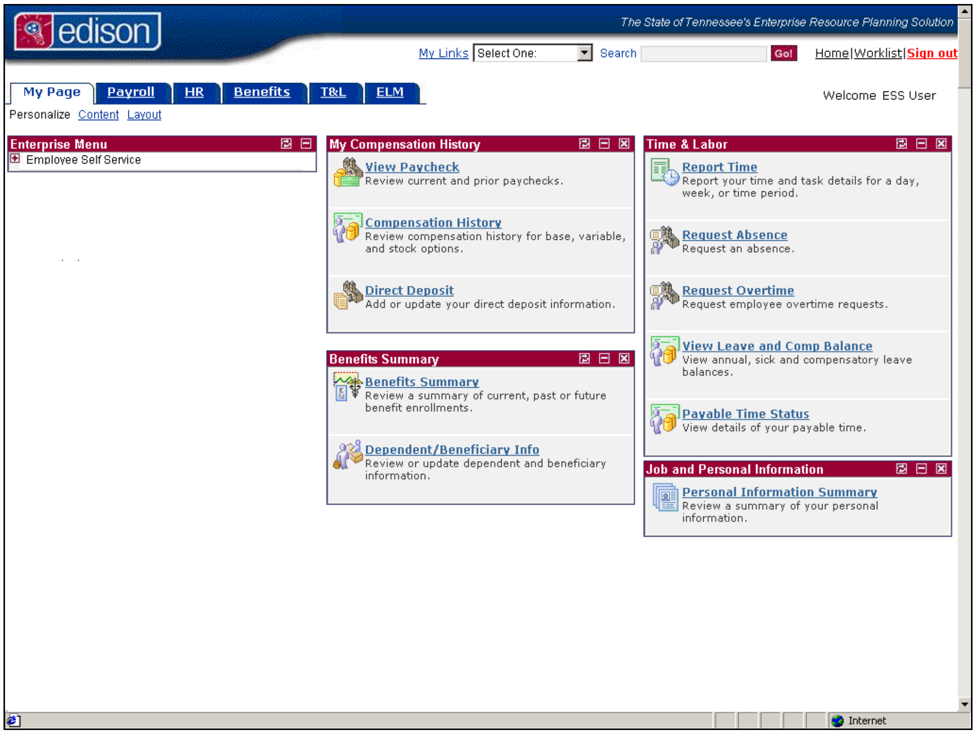
Emergency Contacts - View, Update & Add

Employees may add/update their emergency contacts using Self-Service. For each emergency contact, an employee may enter a name, relationship to employee, full address, and one or more telephone numbers. If more than one contact is recorded, the employee can designate one as the "primary" emergency contact.

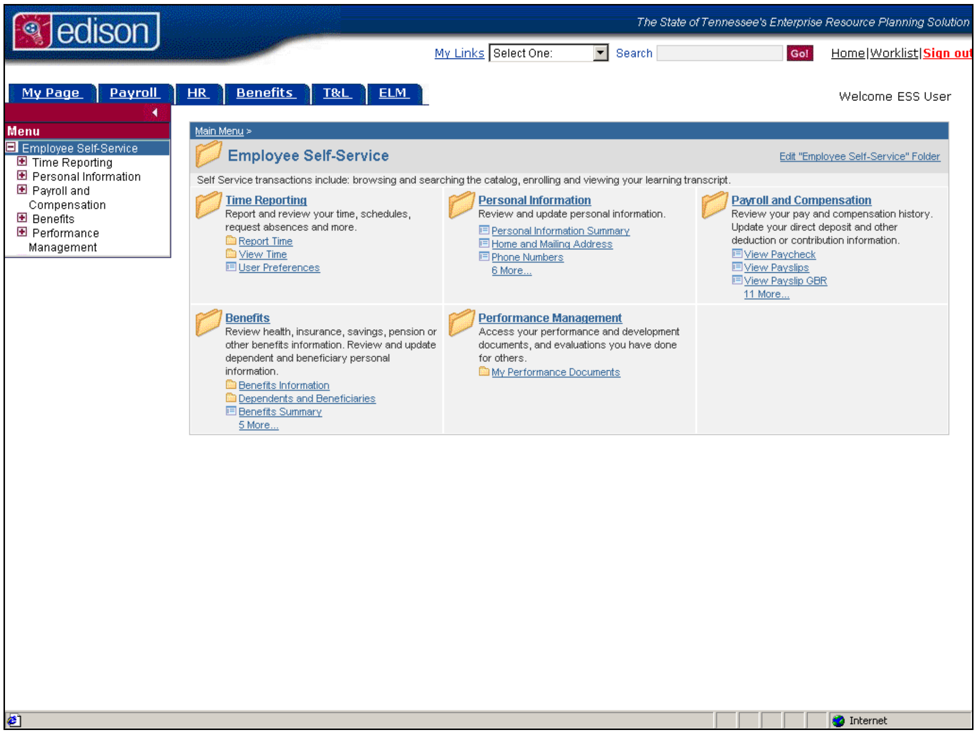
Procedure

In this lesson, you will learn to view, update, and add an **Emergency Contact** who can be contacted in case of an emergency. You will also learn how to change the primary contact.

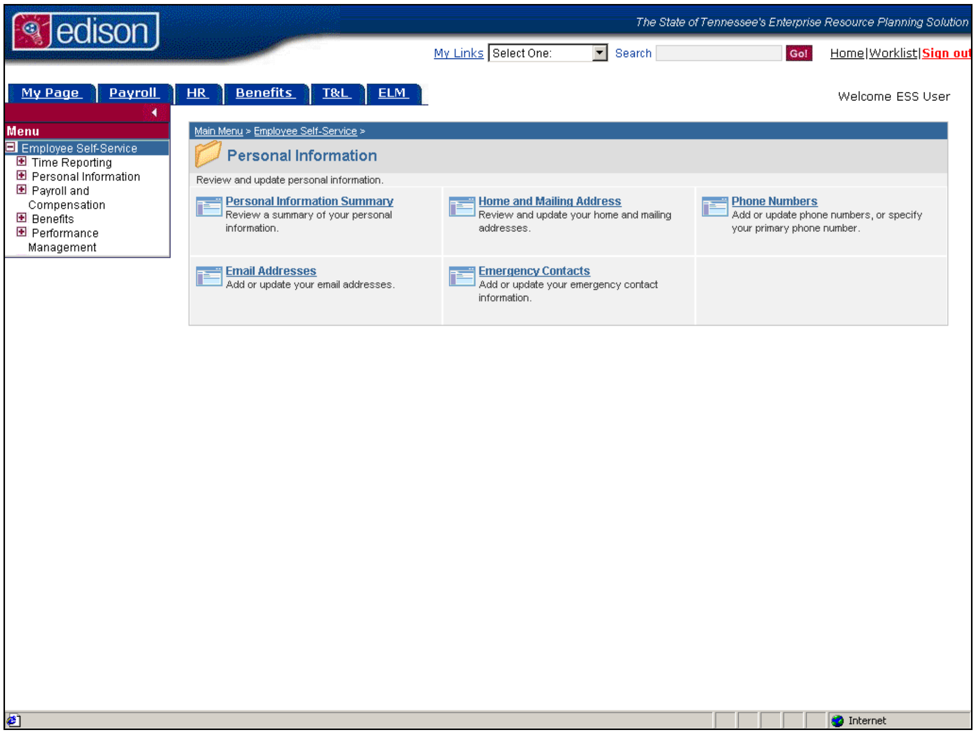
Kelley Korody will be used as an example in this lesson.



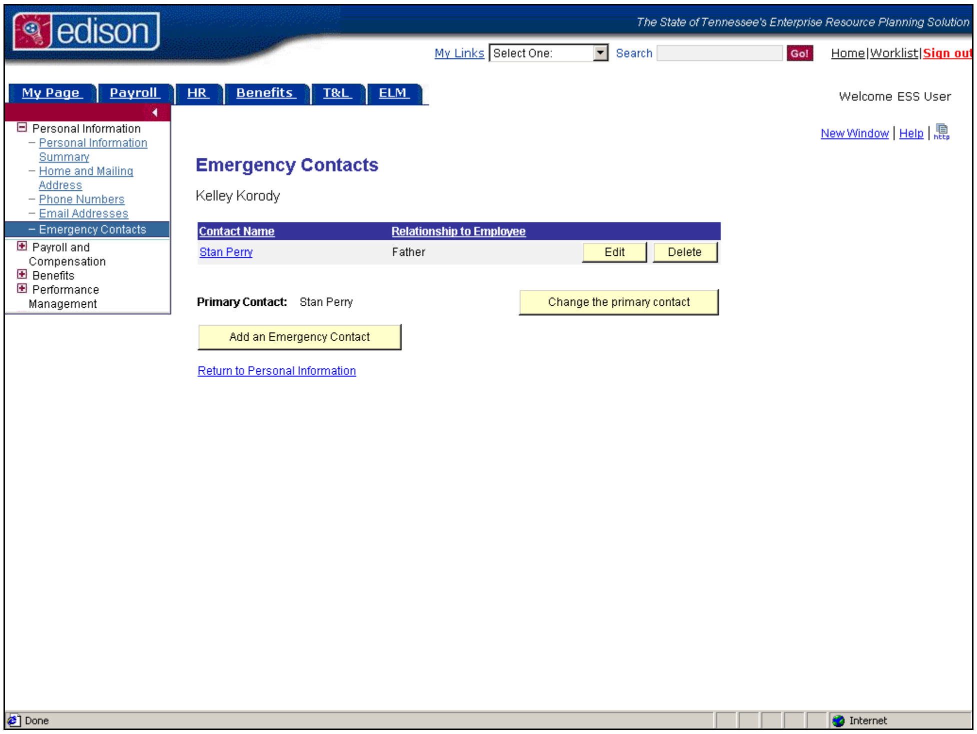
Step	Action
1.	Begin by clicking on the **Employee Self Service** link. Employee Self Service

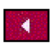


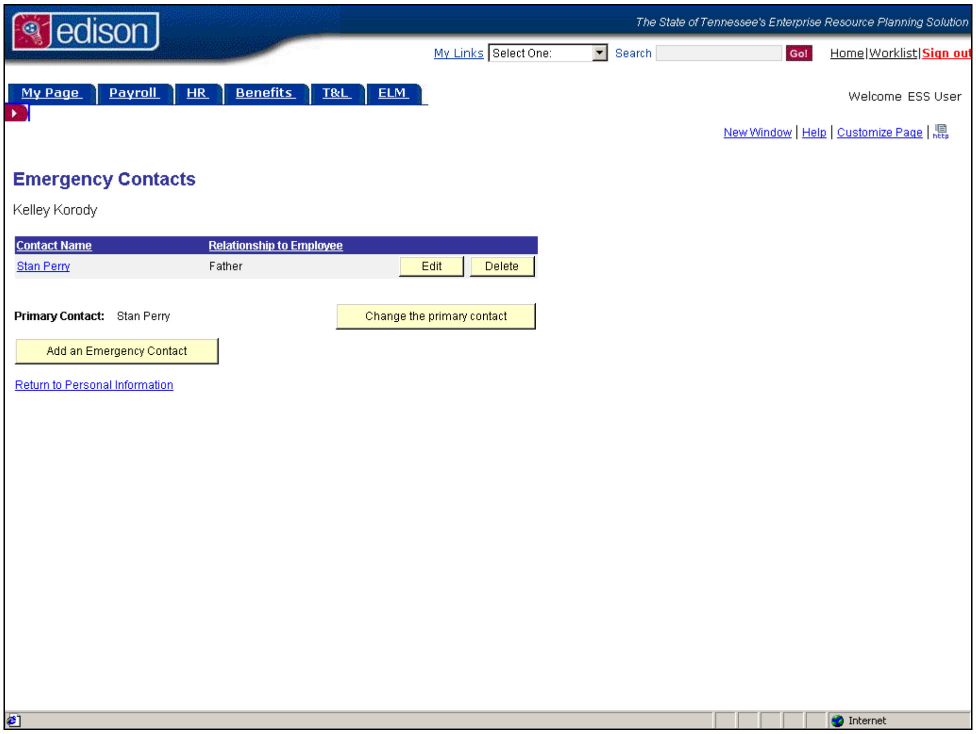
Step	Action
2.	Click the **Personal Information** link. Personal Information



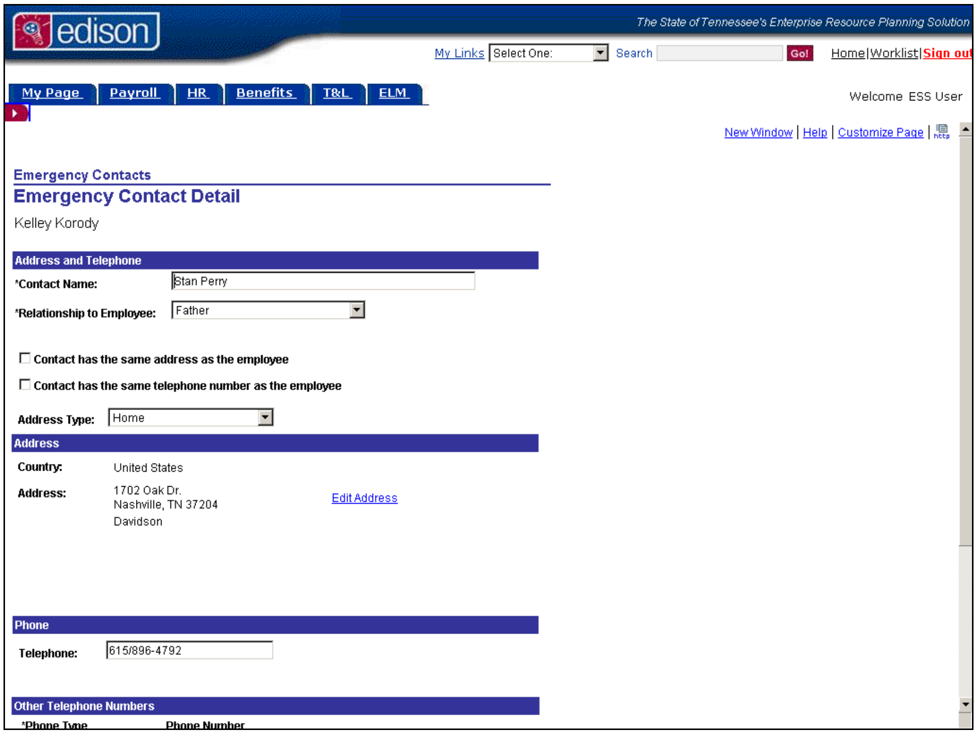
Step	Action
3.	Click the **Emergency Contacts** link. 



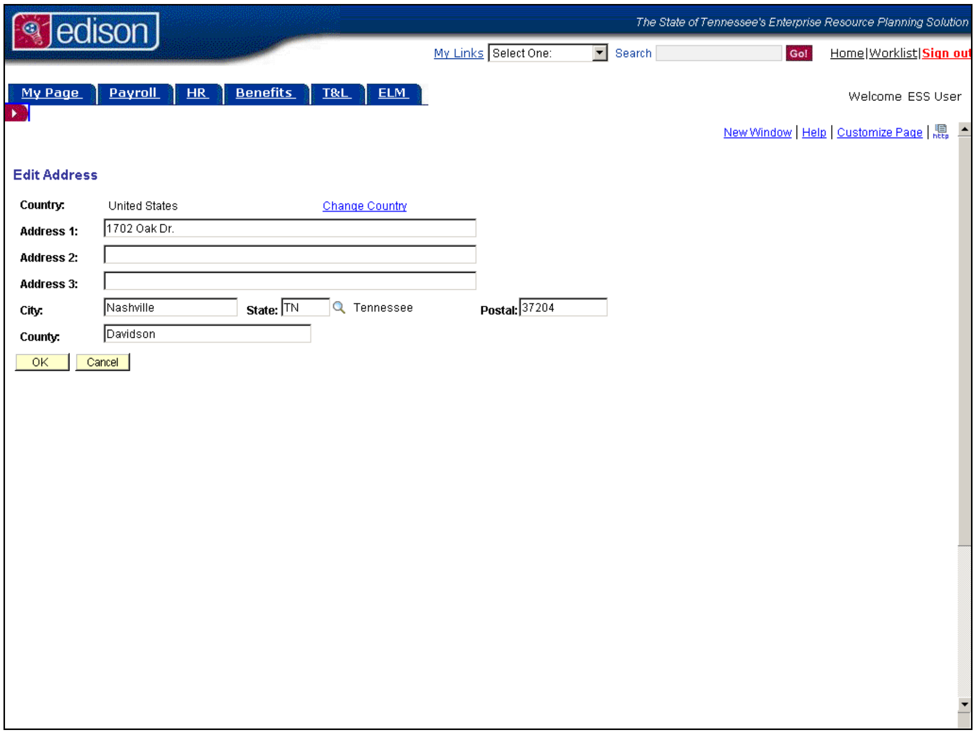
Step	Action
4.	Click the **Collapse** button to enlarge the screen. 



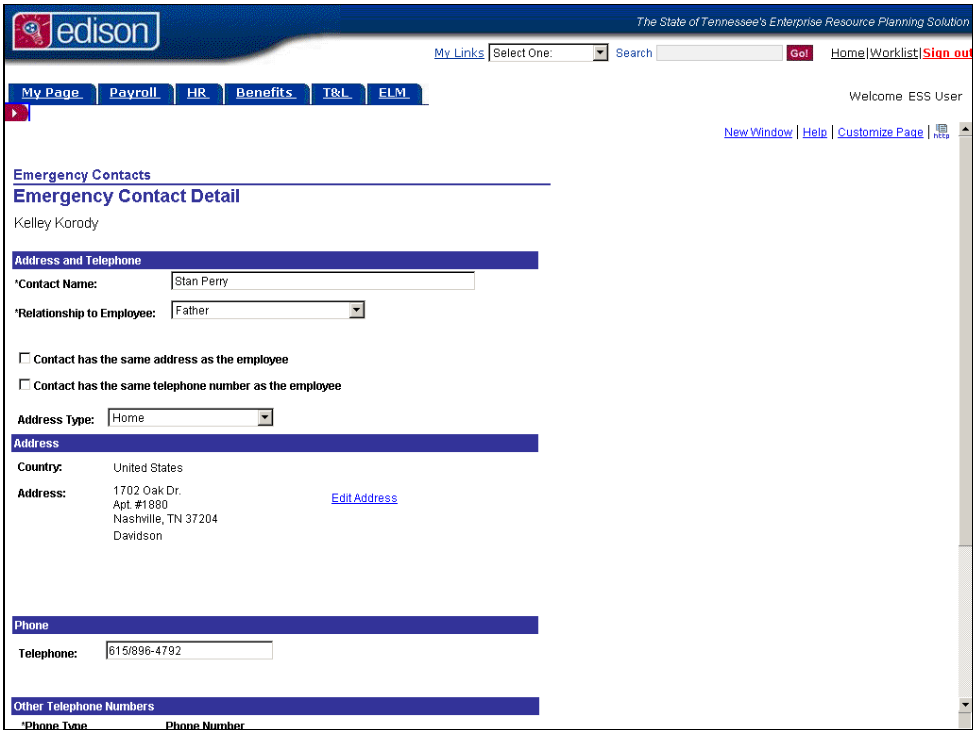
Step	Action
5.	Click the **Edit** button. Edit
6.	Accurate emergency contact information is critical in case of an emergency at work. The contact details should be for the person that you would like to have contacted in case of an emergency at work.



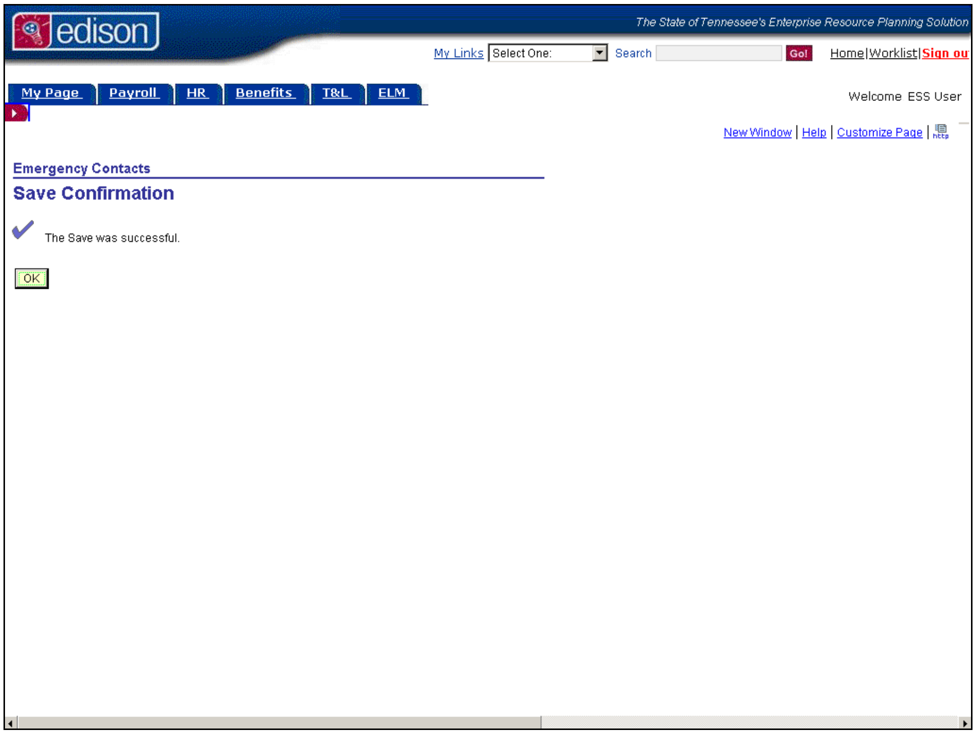
Step	Action
7.	In this example, you need to add an apartment number to the address for Stan Perry. Click the **Edit Address** link. Edit Address



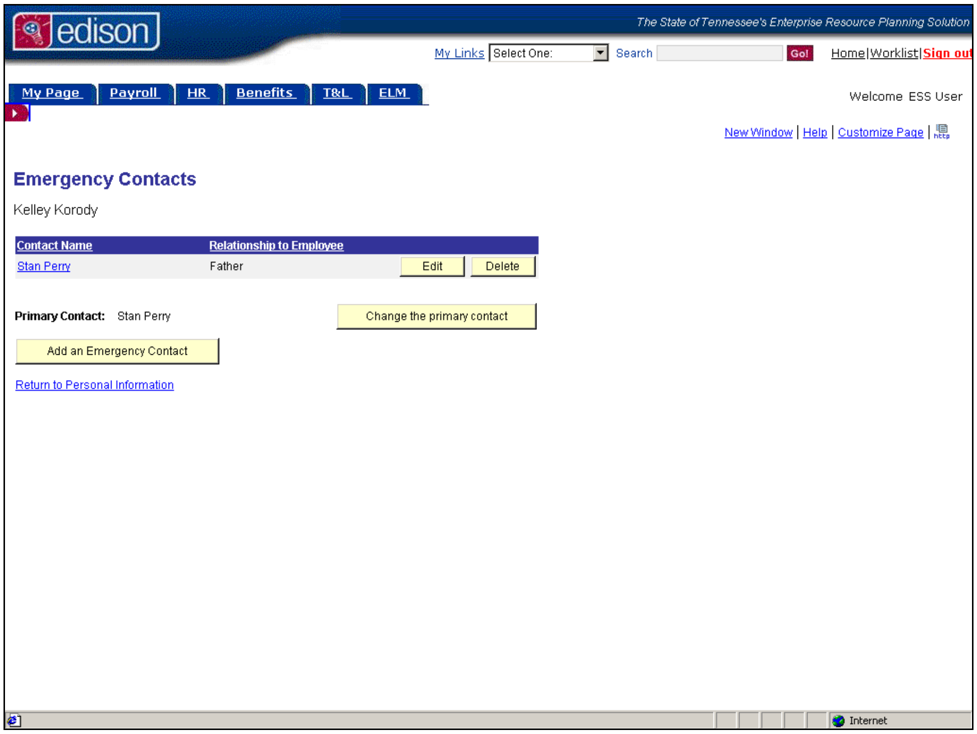
Step	Action
8.	Click in the **Address 2** field.
9.	Enter the desired information into the **Address 2** field. Enter "**Apt. #1880**".
10.	Click the **OK** button. 

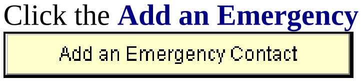


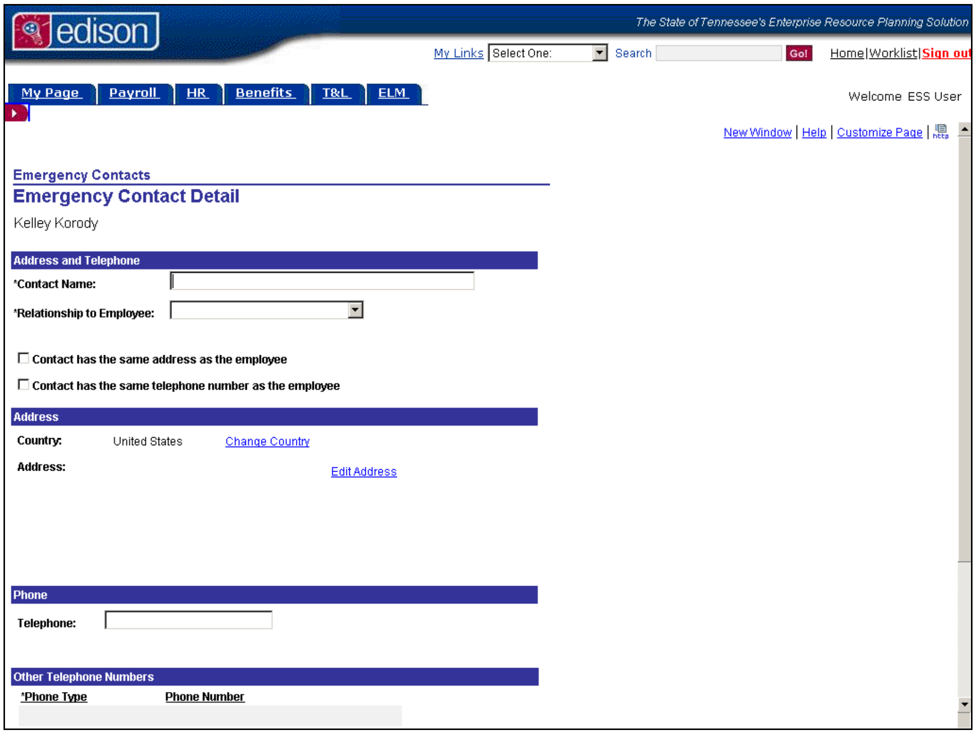
Step	Action
11.	Click the scrollbar to scroll down the page.
12.	Click the **Save** button. Save



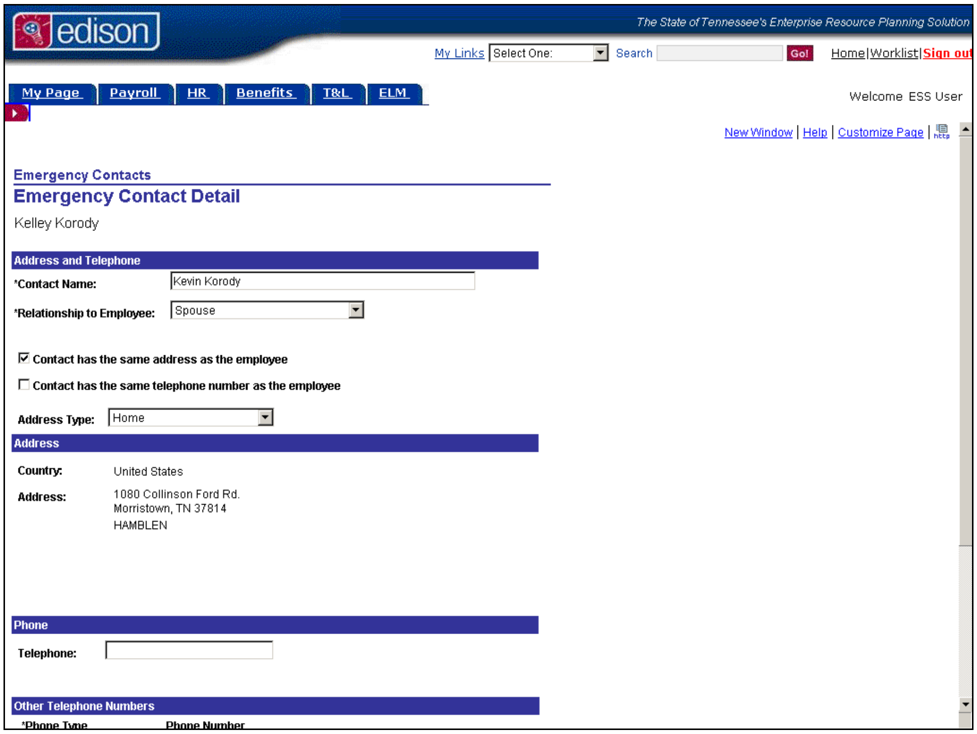
Step	Action
13.	Click the **OK** button. OK



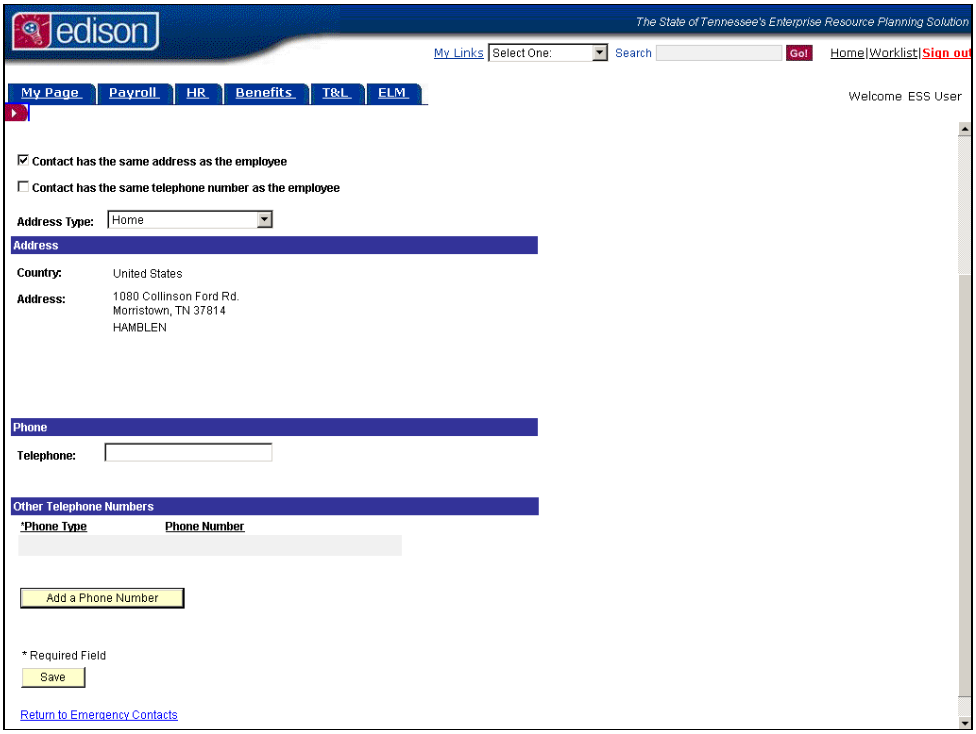
Step	Action
14.	Now let's add a second emergency contact for Kelley Korody. Click the **Add an Emergency Contact** button. 
15.	Click in the **Contact Name** field.



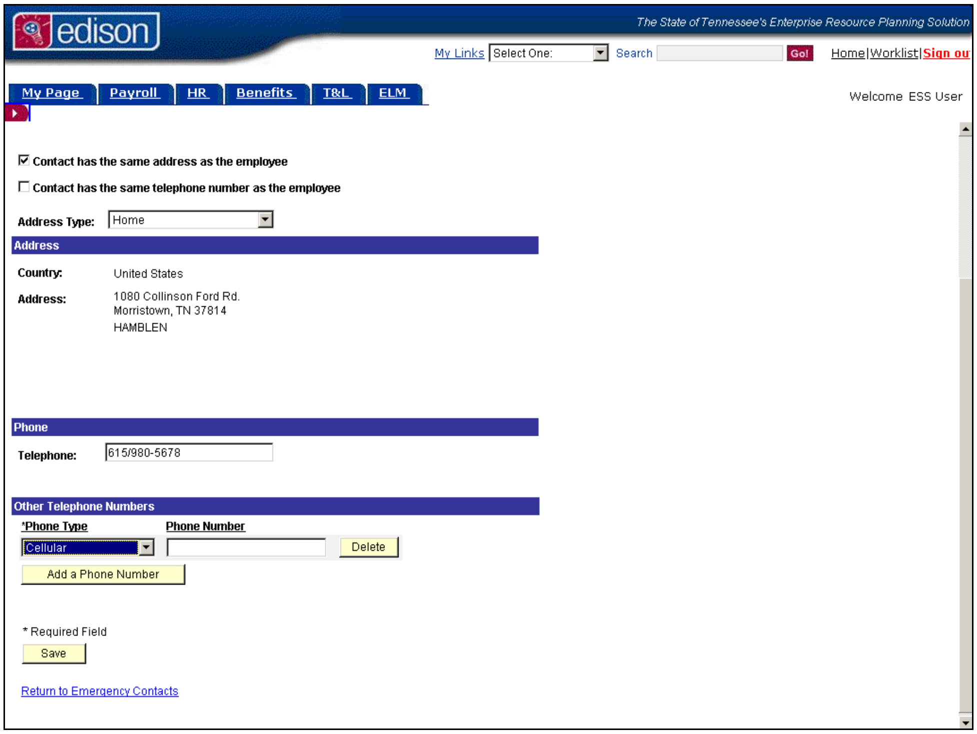
Step	Action
16.	Enter "**Kevin Korody**" into the **Contact Name** field.
17.	Click the **Relationship to Employee** drop down list. 
18.	Click the **Spouse** list item. 
19.	We click this option because Kelley Korody's spouse has the same address. If the address of the contact person differs from that of the employee, then leave this box unchecked. In this case, an additional address needs to be added in the **Address** section on this page.
20.	Click the **Contact has the same address as the employee** option. 
21.	When the emergency contact person has the same phone number, you can click the **Contact has the same telephone number as the employee** box to automatically add the telephone number. In this example, Kelly's husband has a different telephone number so we will not be checking this box.



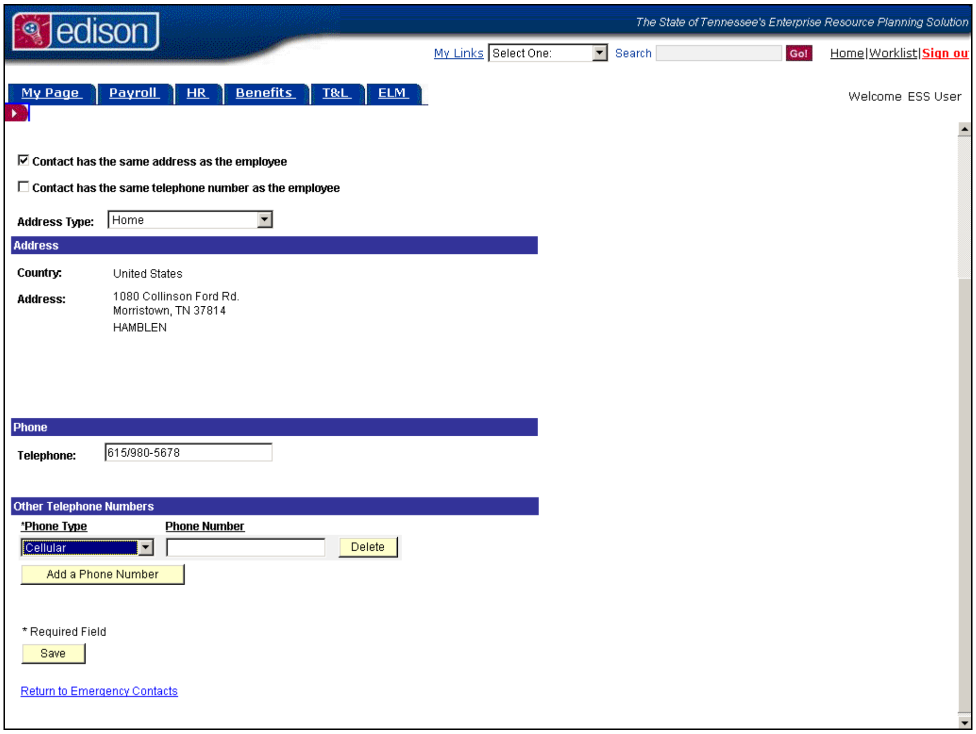
Step	Action
22.	Click the **scrollbar** to scroll down to the bottom of the page.
23.	Click in the **Telephone** field.



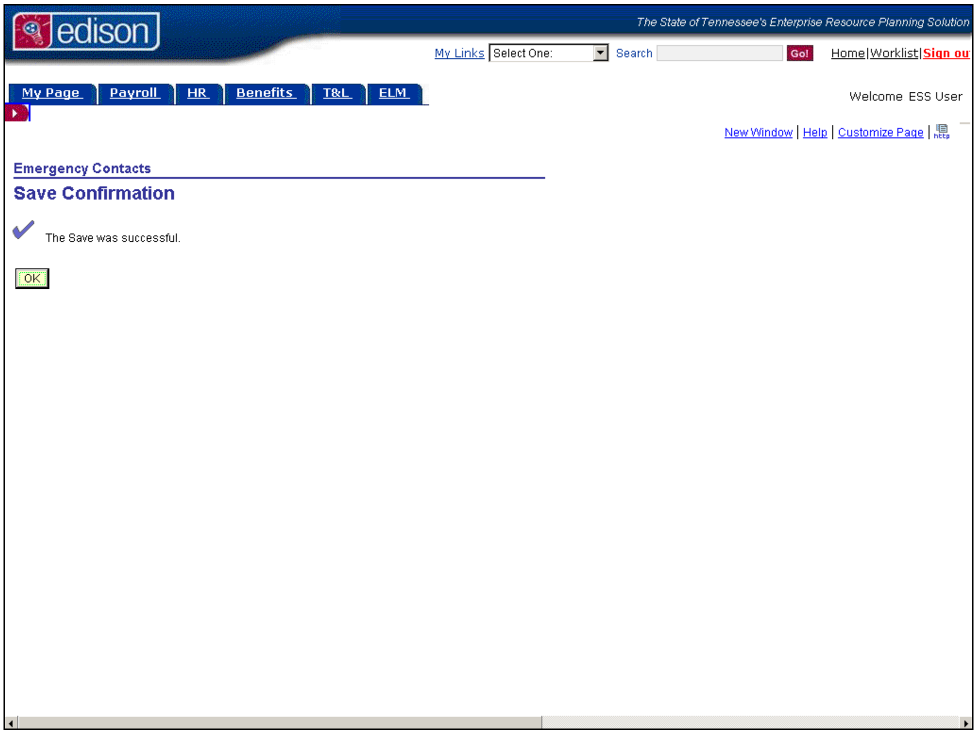
Step	Action
24.	Enter "**6159805678**" into the **Telephone** field.
25.	If the contact has multiple phone numbers, you may add additional phone number by clicking on the **Add a Phone Number** button. Click the **Add a Phone Number** button. 
26.	Click the **Phone Type** drop down list. 
27.	Click the **Cellular** list item. 



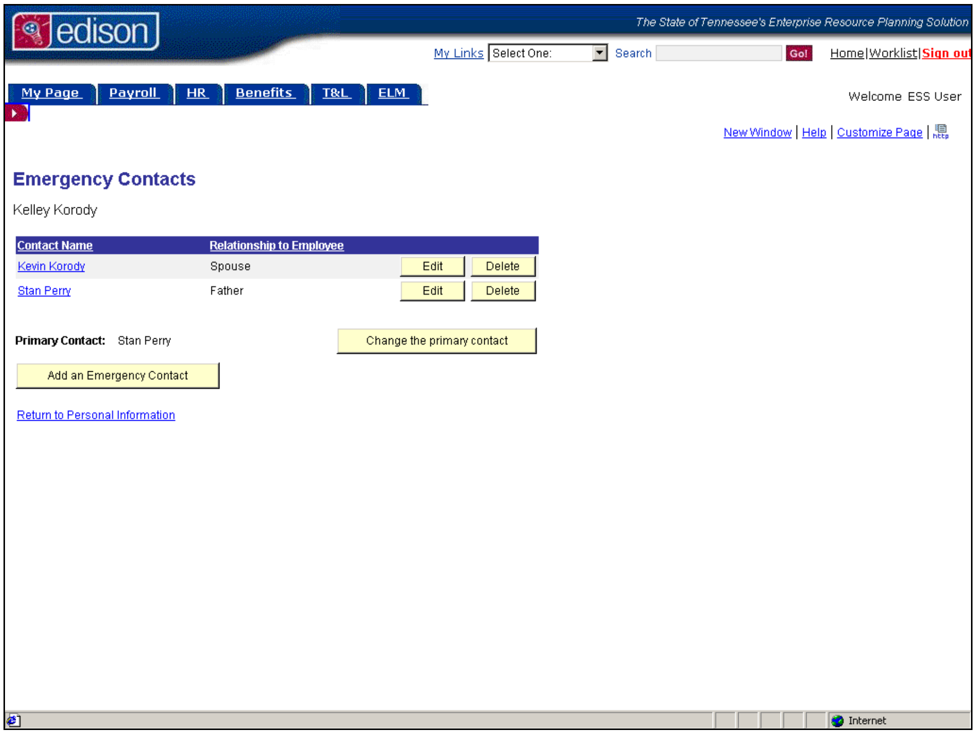
Step	Action
28.	Click in the **Phone Number** field. 



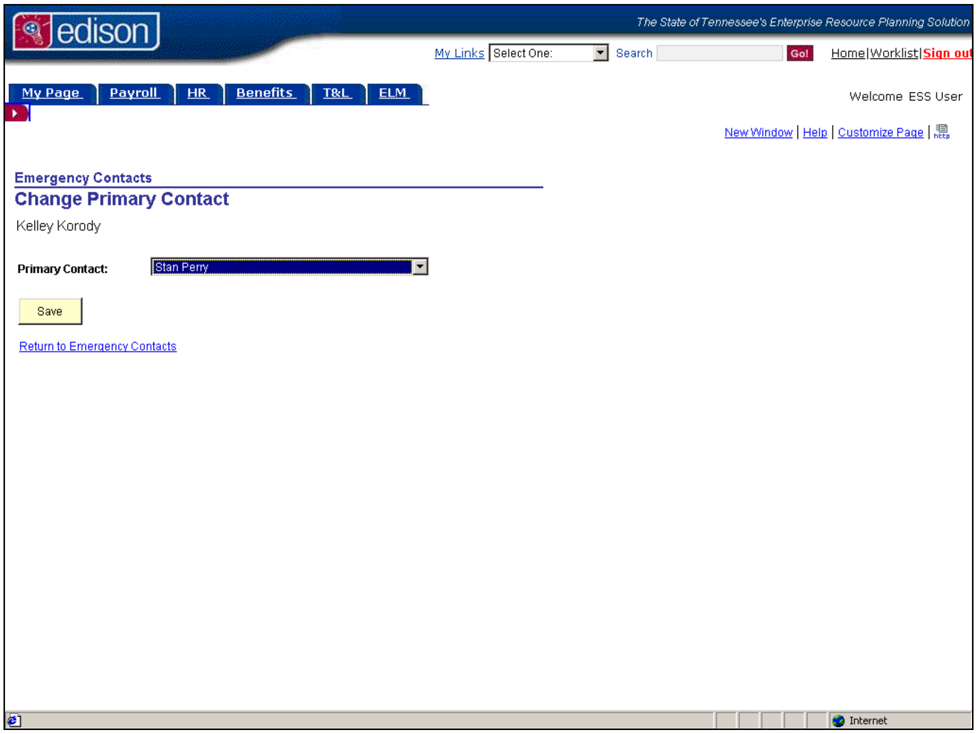
Step	Action
29.	Enter "**6159877623**" into the **Phone Number** field.
30.	Click the **Save** button. 



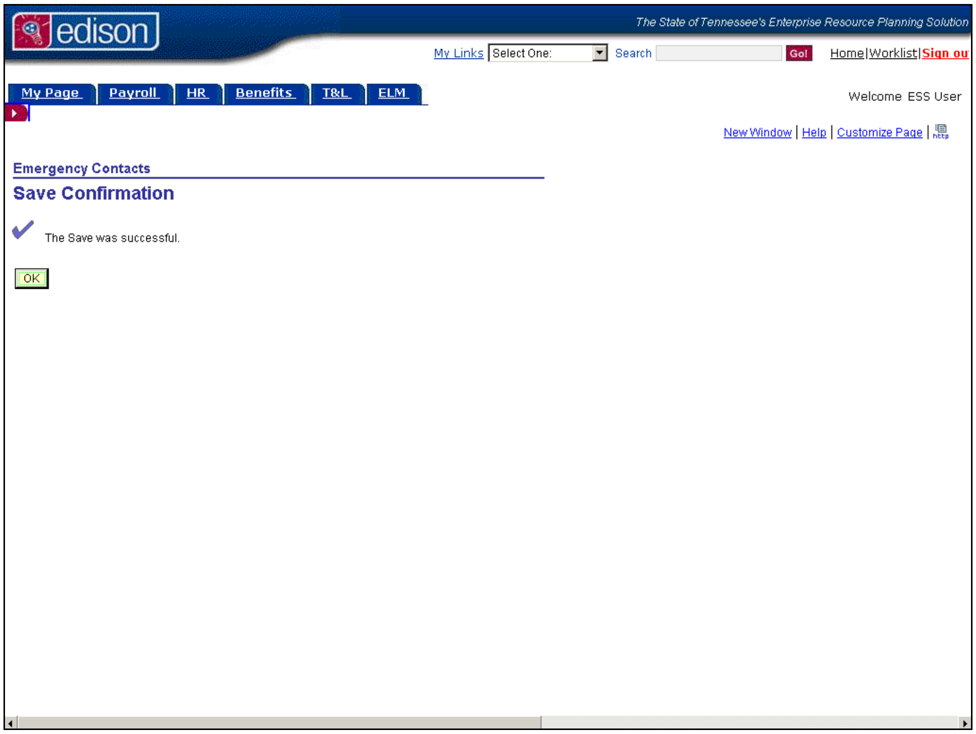
Step	Action
31.	Click the **OK** button. 
32.	Notice that the Spouse has now been added as an emergency contact, but Stan Perry still shows as the **Primary Contact**. Let's change the **Primary Contact** to be Kelley's spouse **Kevin Korody**.



Step	Action
33.	Click the **Change the primary contact** button. Change the primary contact



Step	Action
34.	Click the **Primary Contact** drop-down list.
35.	Click the **Kevin Korody** list item. Kevin Korody
36.	Click the **Save** button. Save



Step	Action
37.	Click the **OK** button. 
38.	Notice that the **Primary Contact** now shows Kelley's spouse **Kevin Korody**.
39.	You have successfully completed viewing, updating, and adding the **Emergency Contact** details for Kelley Korody. **End of Procedure.**

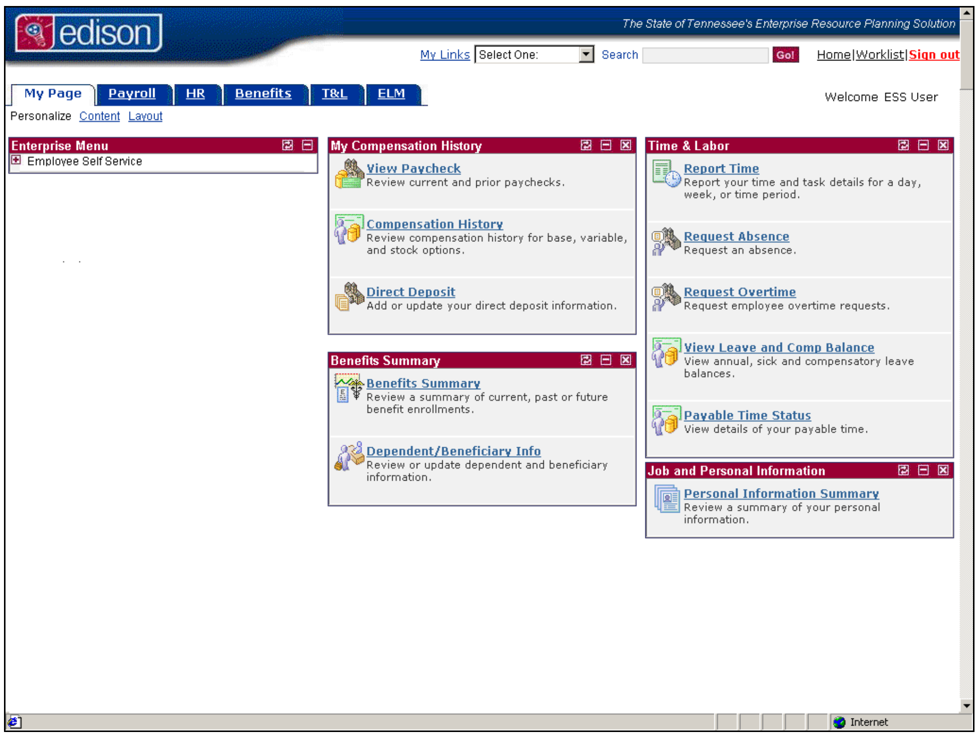
Performance Evaluation - View Performance

Employees may view their Job Performance Plan and Formal Performance Evaluation documents using Self-Service. The Interim Work Review document is completed outside of Edison. However, the Interim Work Review period and the date of discussion are entered by the Manager (Supervisor) into Edison and the Employee is able to view this information for accuracy and record-keeping purposes. Employees may also indicate their agreement or disagreement by adding comments to any of their Formal Performance Evaluation documents and should acknowledge all Performance Evaluation documents using Self-Service. However, Managers have the ability to acknowledge a performance evaluation document if the employee temporarily does not have access to a computer or if the employee refuses to acknowledge a performance evaluation document.

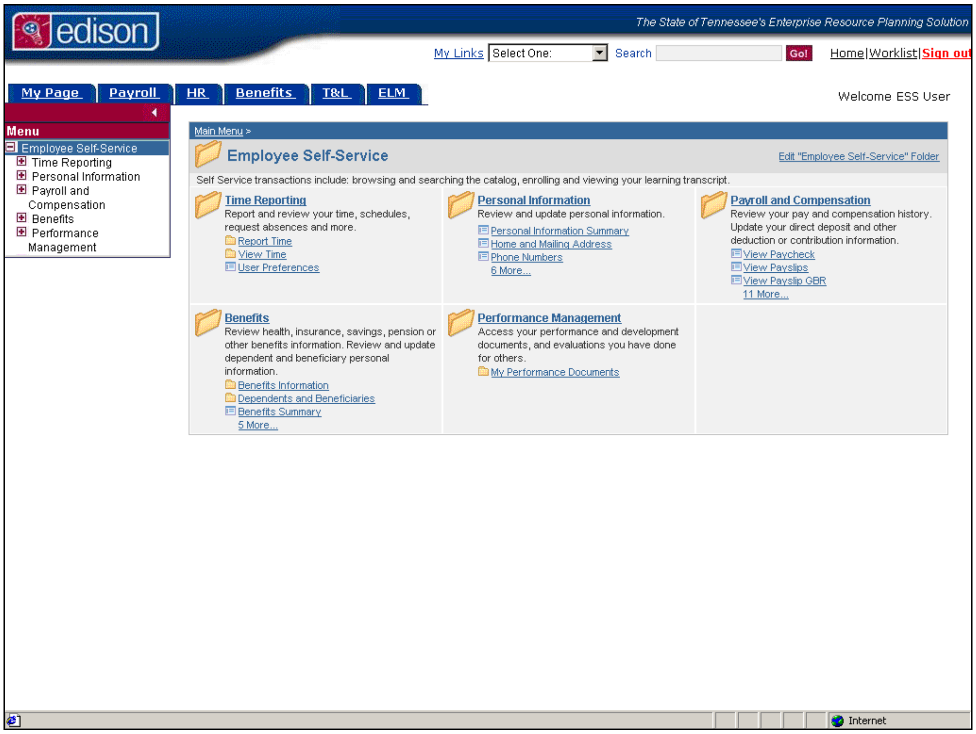
Procedure

In this lesson, you will learn to review your **Performance Evaluation** documents and indicate your agreement or disagreement by adding comments as applicable.

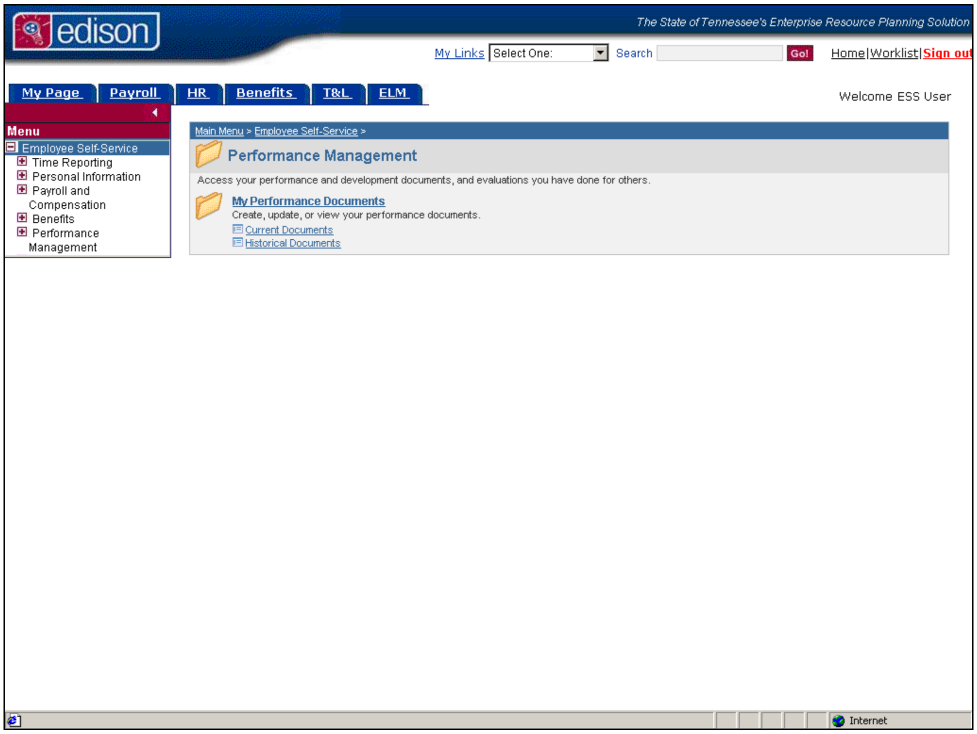
Kelley Korody will be used as an example in this lesson.



Step	Action
1.	Begin by clicking the **Employee Self Service** link. Employee Self Service

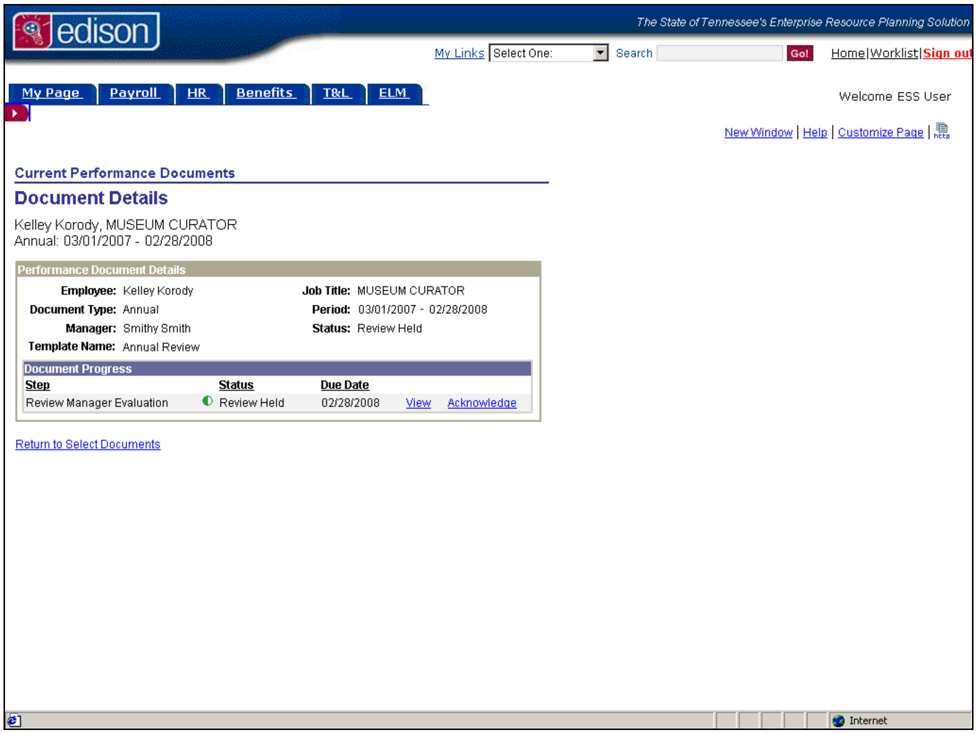


Step	Action
2.	Click the **Performance Management** link. Performance Management

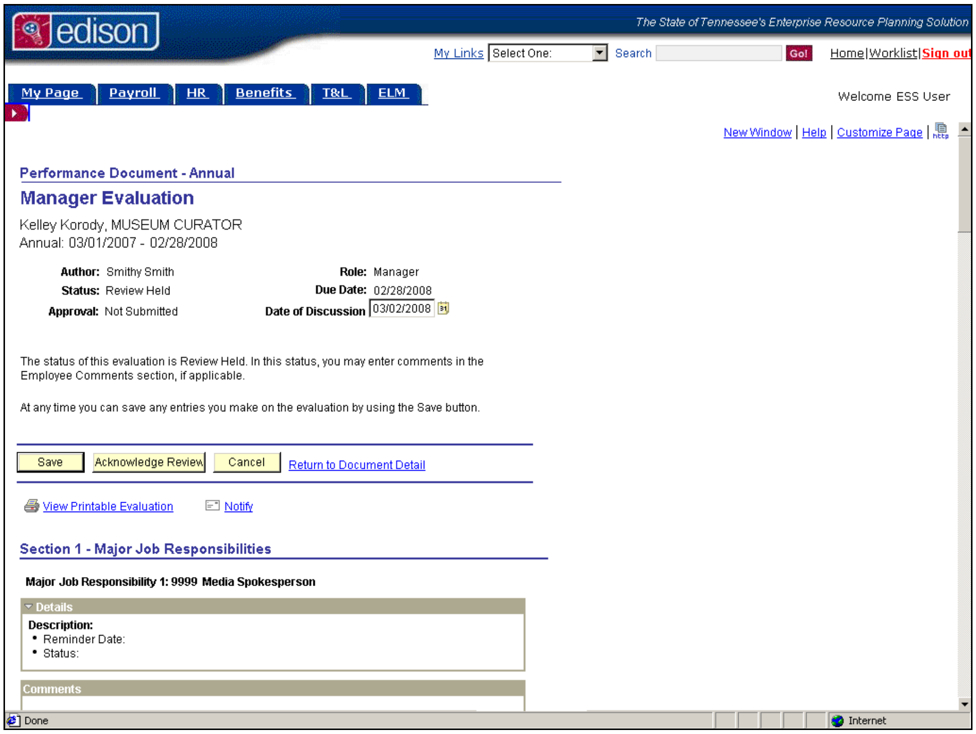


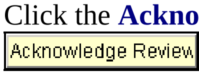
Step	Action
3.	Click the **My Performance Documents** link. My Performance Documents
4.	Click the **Current Documents** link. Current Documents

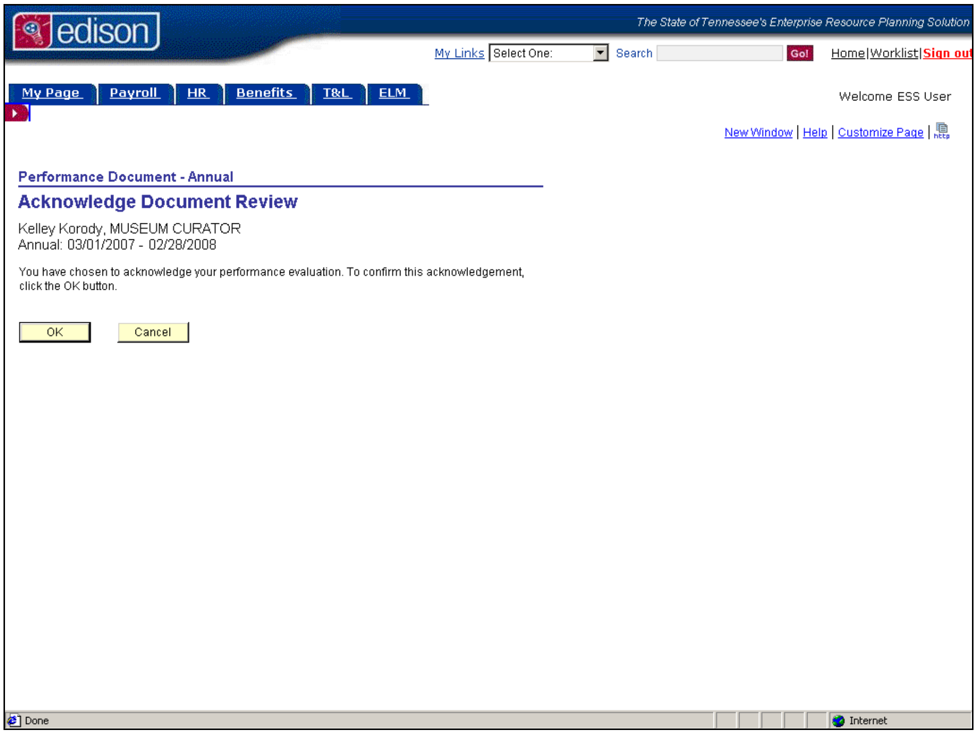
Step	Action
5.	Click the **Collapse** button to enlarge the screen. 
6.	Click on the **Annual** entry in the **Document Type** column. Annual

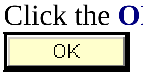


Step	Action
7.	Click on the **View** link to review the Performance Evaluation**.** View
8.	The Manager Evaluation page displays details such as **Author**, **Role**, **Status**, **Due Date**, **Approval**, **Date of Discussion** and includes sections for **Major Job Responsibilities**, **Overall Summary**, **Employee Comments** and **Manager Comments** on Formal Performance Evaluation documents. For each **Major Job Responsibility**, a rating and applicable comments have been recorded. In addition, the Manager will enter an overall rating and overall comments.



Step	Action
9.	Click on the scrollbar to see additional information.
10.	Click on the scrollbar to see additional information.
11.	Click on the scrollbar to see additional information.
12.	Click on the scrollbar to see additional information.
13.	Click on the scrollbar to see additional information.
14.	The employee can click in the **Employee Comments** field to indicate agreement or disagreement and enter a response to the evaluation. Click in the **Employee Comments** field.
15.	Enter "**I agree with this evaluation. The overall performance evaluation was fair and satisfactory.**" in the **Employee Comments** field.
16.	Click on the scrollbar to see additional information.
17.	If you would like to save your **Employee Comments** but not submit them yet, you can click the **Save** button to return to this page later and submit your acknowledgement.
18.	Click the **Acknowledge Review** button to send the acknowledgement to the Manager. 



Step	Action
19.	Click the **OK** button. 
20.	You have successfully completed reviewing, adding comments and acknowledging the **Performance Evaluation** document. **End of Procedure.**

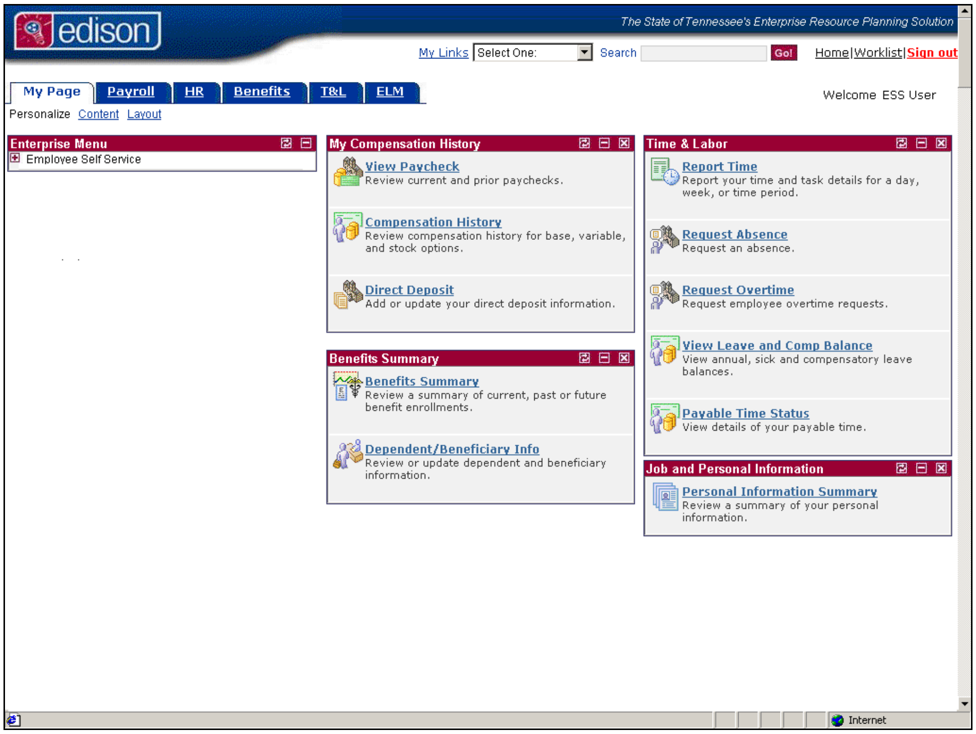
Personal Information - View Summary

The Personal Information Summary page provides employees with a variety of information that is contained in their HR record. Found in Self-Service, employees may view information including their home and mailing address, telephone number(s), Emergency Contacts, Email Address(es), Ethnic Group, Date of Birth, Social Security Number, and Military Status. Employees have the ability to add or edit some of this information – such as their home address, telephone number(s), emergency contacts, and email address(es). Employees should contact their Agency's Human Resources Office if other personal information needs to be corrected.

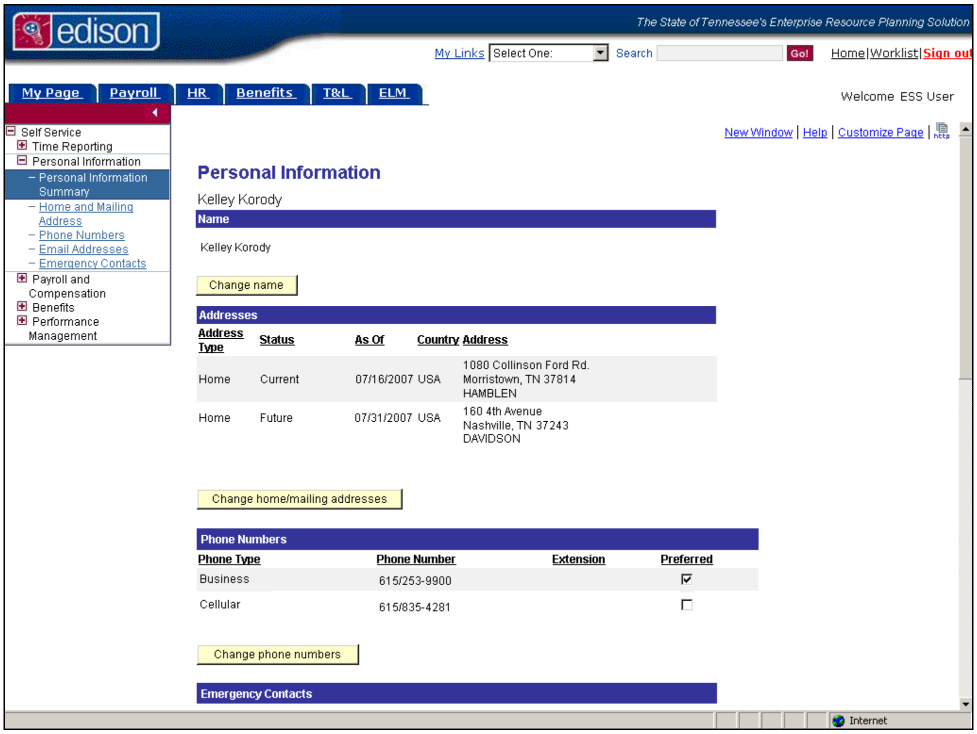
Procedure

In this lesson, you will learn to review your **Personal Information Summary** and make any required modifications.

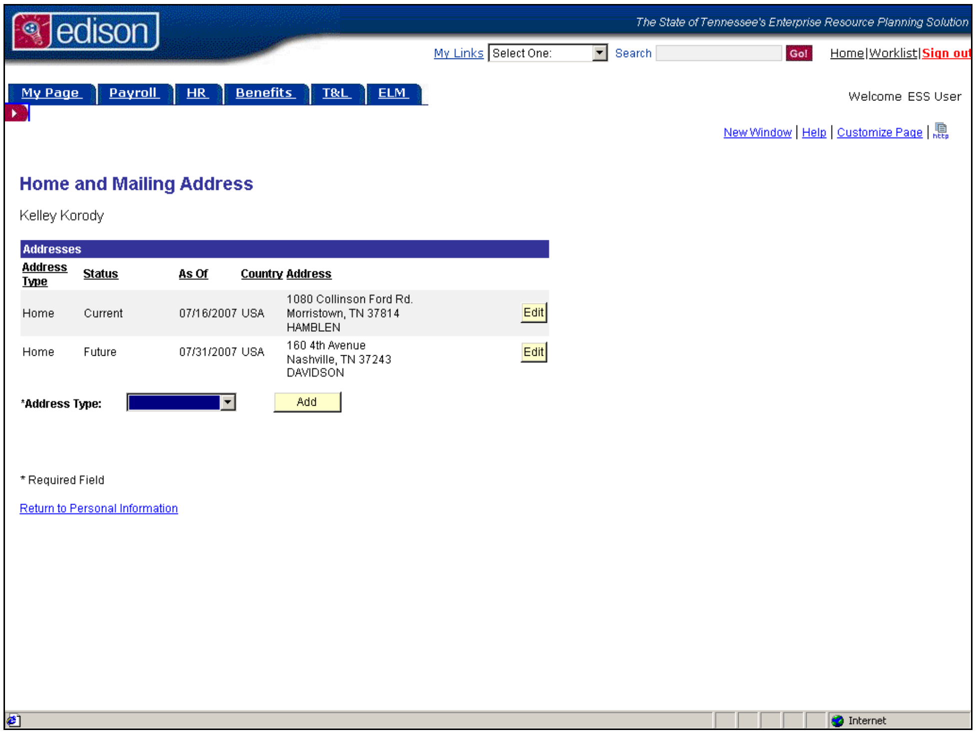
Kelley Korody will be used as an example in this lesson.



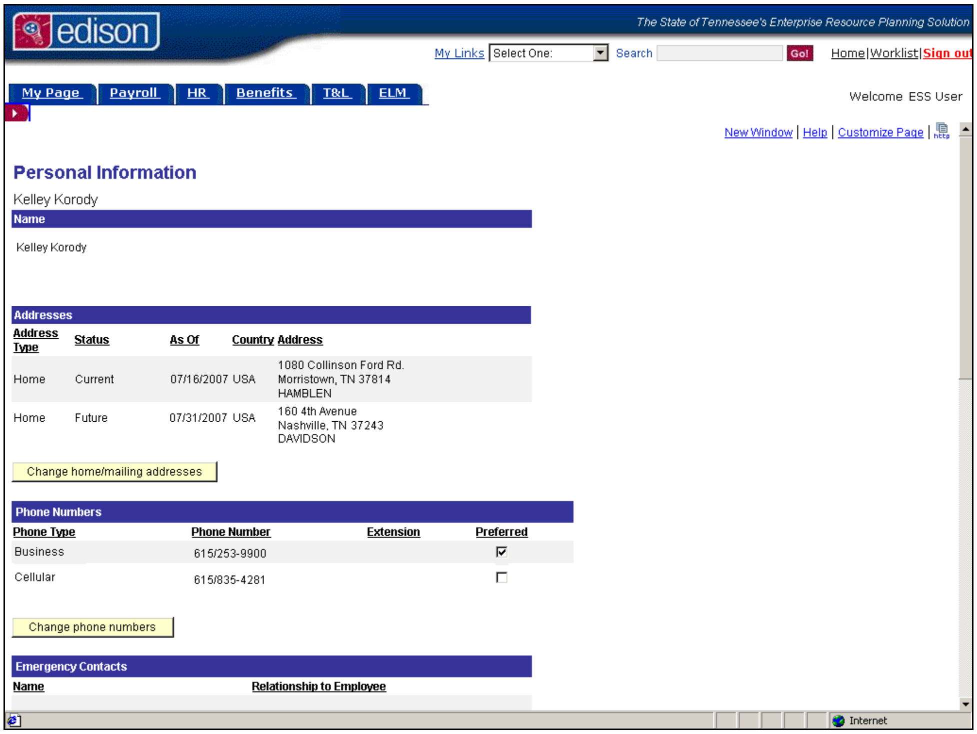
Step	Action
1.	Begin by clicking the **Personal Information Summary** link. Personal Information Summary



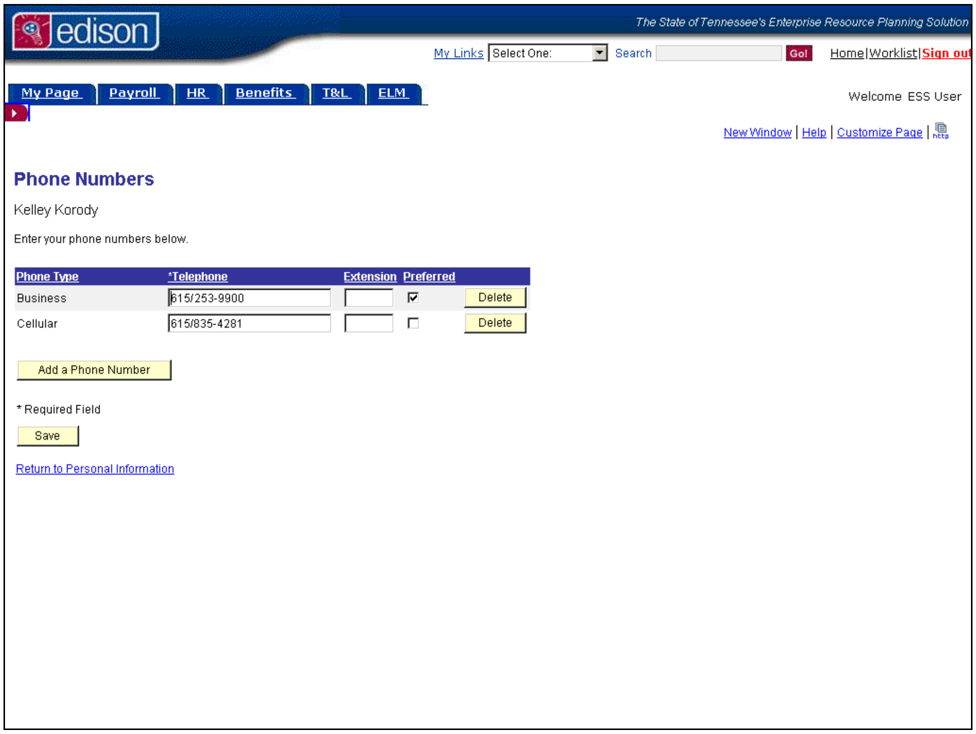
Step	Action
2.	Click the **Collapse** button to enlarge the screen. 
3.	The **Name** section will display the full name of the employee. Edison will not allow employees to make name changes through self service. In order to change your name, you will need to contact your agency's Human Resources Office and provide them with the appropriate information.
4.	The **Address** section lists the Home and Mailing addresses for an employee.
5.	Notice that the **Addresses** may be updated directly from the **Personal Information** page by clicking on the **Change home/mailing addresses** button.
6.	Click the **Change home/mailing addresses** button to edit an address. Change home/mailing addresses
7.	To update an **Address**, follow the steps outlined in the **Address - View & Update** script.



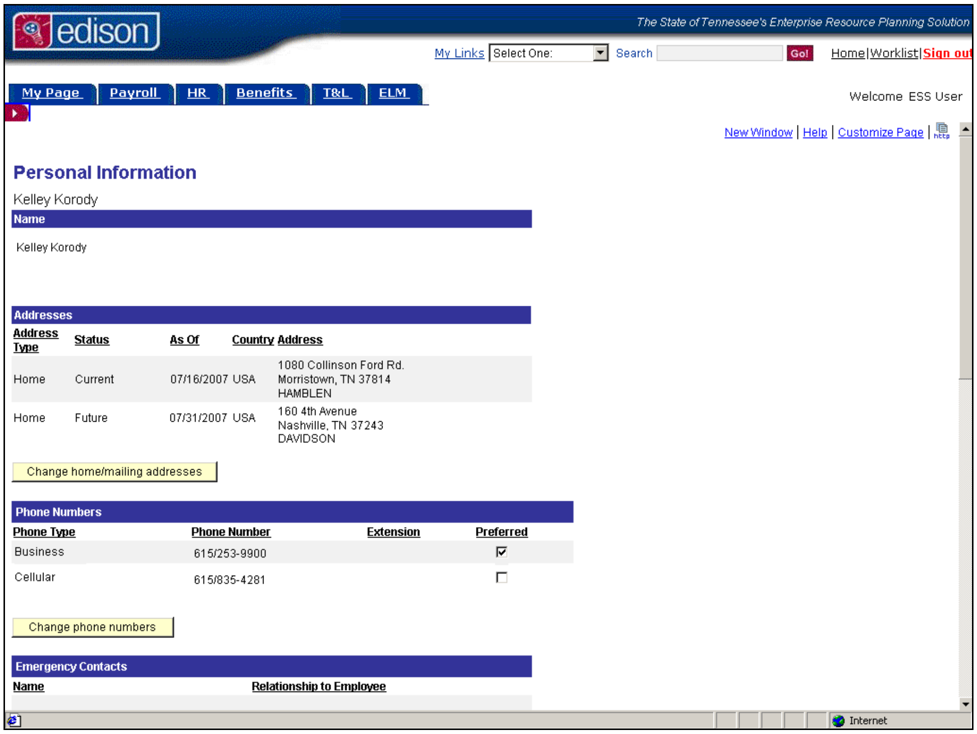
Step	Action
8.	Click the **Return to Personal Information** link. Return to Personal Information
9.	The **Phone Numbers** section displays the list of phone numbers for an employee.
10.	Notice that the **Phone Numbers** may be updated directly from the **Personal Information** page by clicking on the **Change phone numbers** button.



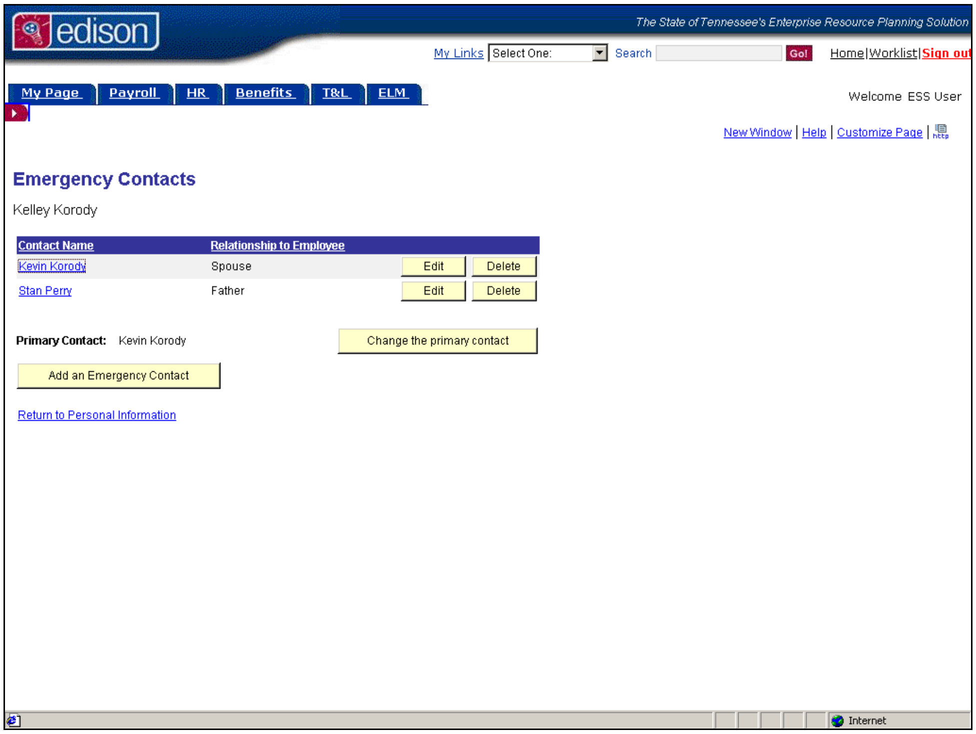
Step	Action
11.	Click the **Change phone numbers** button to add or edit a phone number. Change phone numbers
12.	To update or add a **Phone Number**, follow the steps outlined in the **Phone Numbers - View, Update & Add** script.



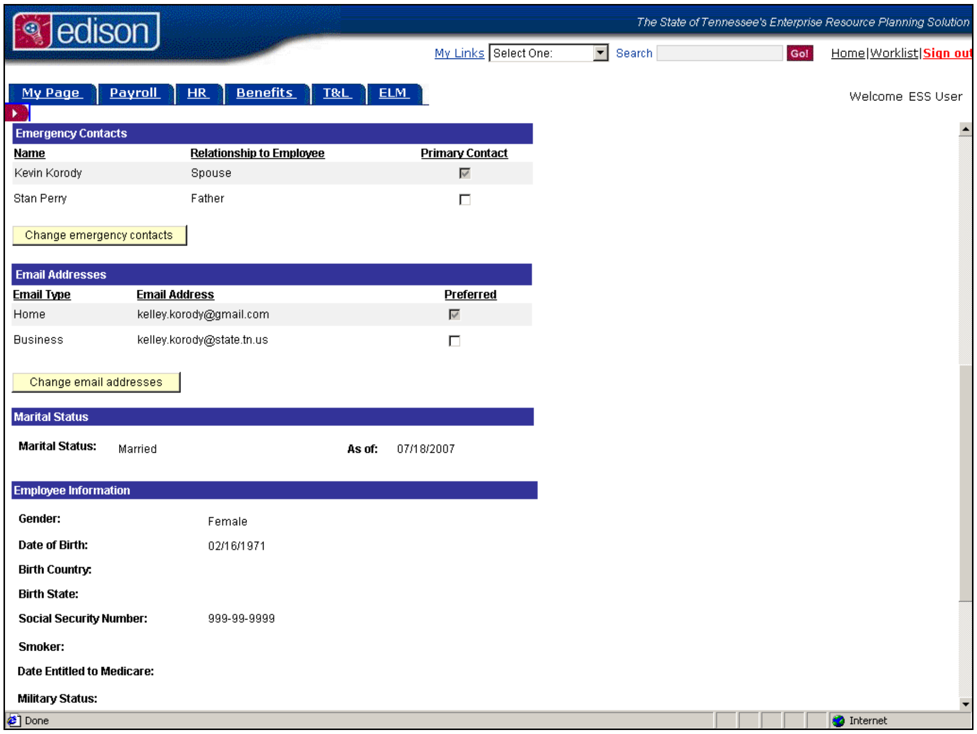
Step	Action
13.	Click the **Return to Personal Information** link. Return to Personal Information



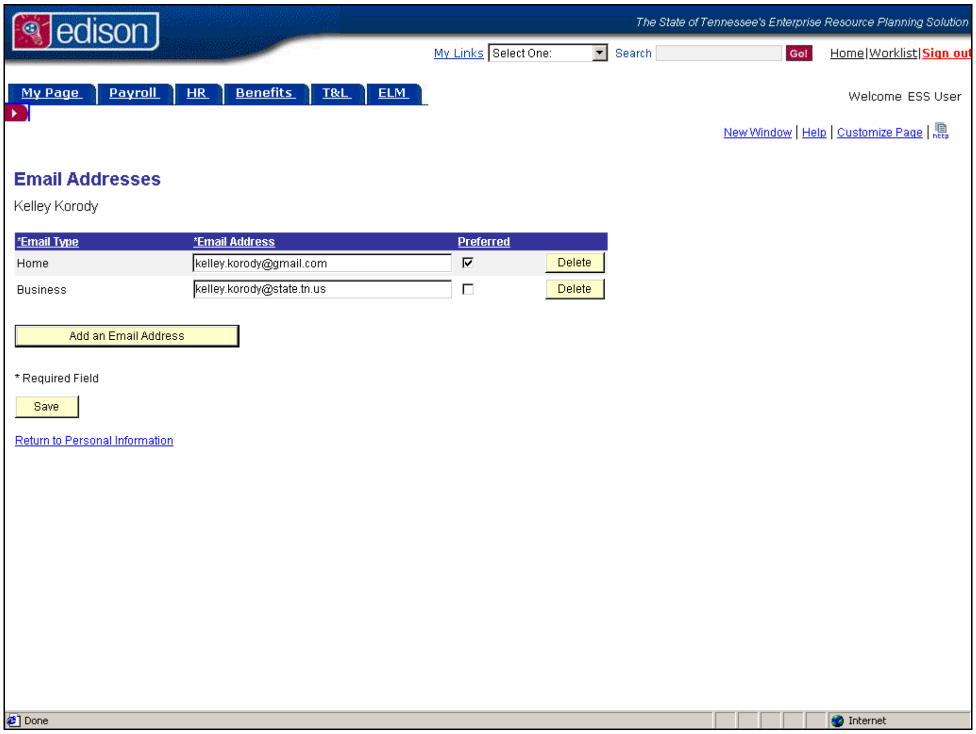
Step	Action
14.	Click the scrollbar to see the information at the bottom of the page.
15.	The **Emergency Contacts** section displays the emergency contact information for an employee.
16.	Notice that the **Emergency Contacts** may be updated directly from the **Personal Information** page by clicking on the **Change emergency contacts** button.
17.	Click the **Change emergency contacts** button to add or edit an emergency contact. Change emergency contacts
18.	To update or add an **Emergency Contact**, follow the steps outlined in the **Emergency Contacts - View, Update, & Add** script.



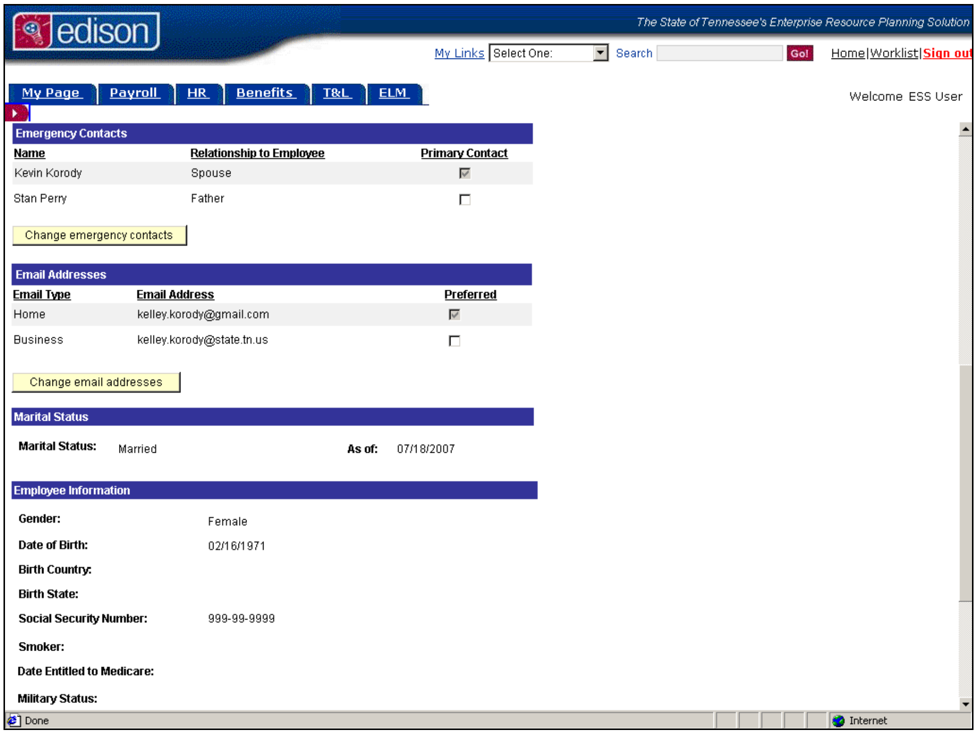
Step	Action
19.	Click the **Return to Personal Information** link. Return to Personal Information
20.	The **Email Addresses** section displays the Email addresses for an employee.
21.	Notice that **Email Addresses** may be updated directly from the **Personal Information** page by clicking on the **Change email addresses** button.



Step	Action
22.	Click the **Change email addresses** button to add or edit an email address. Change email addresses
23.	To enter an **Email Address**, follow the steps outlined in the **Email Addresses - View, Update, & Add** script.



Step	Action
24.	Click the **Return to Personal Information** link. Return to Personal Information
25.	The **Marital Status** section displays the marital status for an employee. Edison will not allow employees to change their **Marital Status** through self service. In order to change your marital status, you will need to contact your agency's Human Resources Office and provide them with the appropriate information.



Step	Action
26.	Click the scrollbar area to scroll down the page.
27.	The **Employee Information** section displays details such as **Gender**, **Date of Birth**, **Birth Country**, **Social Security Number**, **Smoker**, **Date Entitled to Medicare, Military Status, Original Start Date** and **Highest Education Level**. This information is available only for viewing.
28.	The **Ethnic Groups** section will display the description of the ethnic group to which an employee belongs.
29.	You have successfully completed reviewing **Personal Information Summary**. **End of Procedure.**

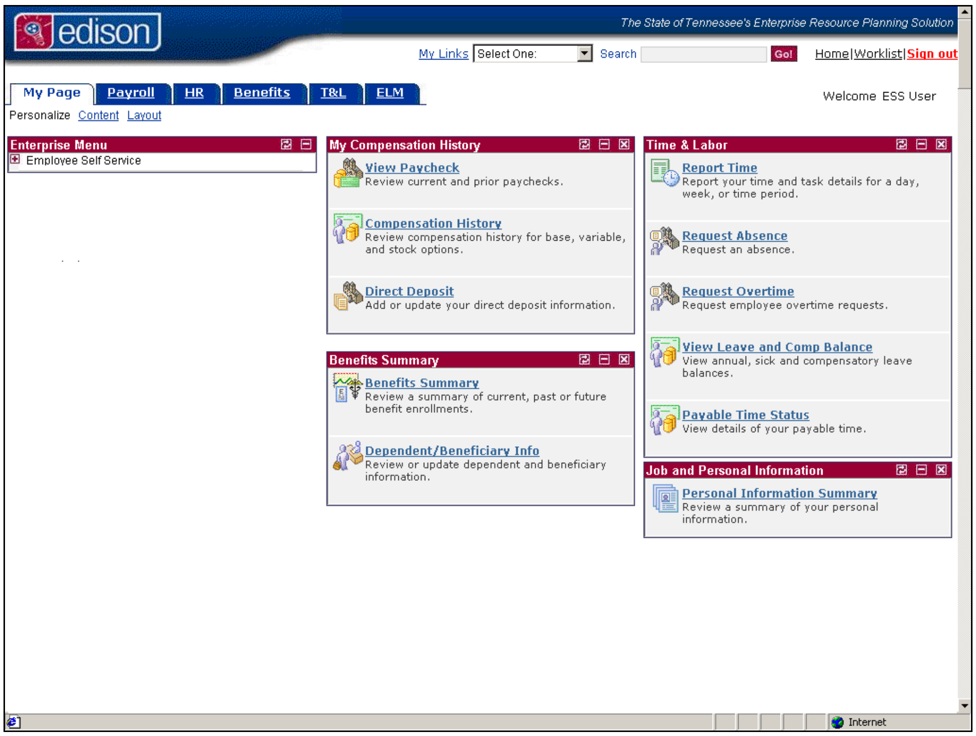
Phone Number - View, Update & Add

Employees may view and update their telephone numbers using Self-Service. Business, cellular and home are examples of some of the telephone numbers that can be stored in Edison. Employees may also elect to add one or more telephone numbers to their Personal Information in Edison. If multiple phone numbers are entered, one must be designated as preferred. **Edison cannot distinguish whether or not a telephone number provided is unlisted. Any telephone number provided becomes a part of the employee's electronic personnel file and may be subject to disclosure under the Public Records Act.**

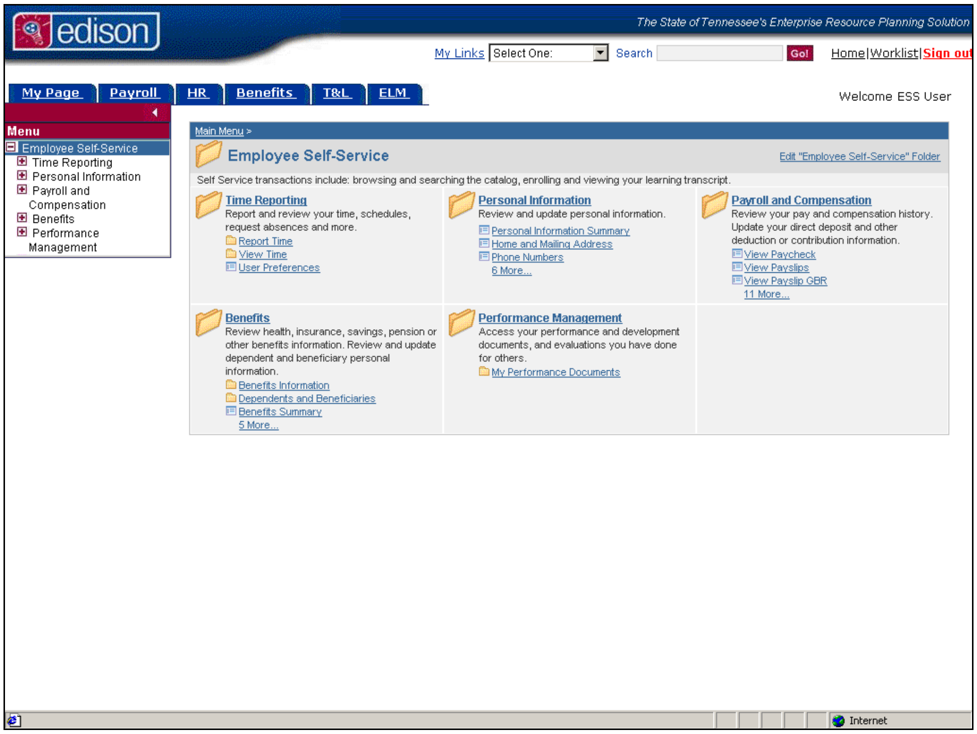
Procedure

In this lesson, you will learn to view and update **Phone Numbers** stored in Edison, as well as, add additional **Phone Numbers** to the list of contact numbers.

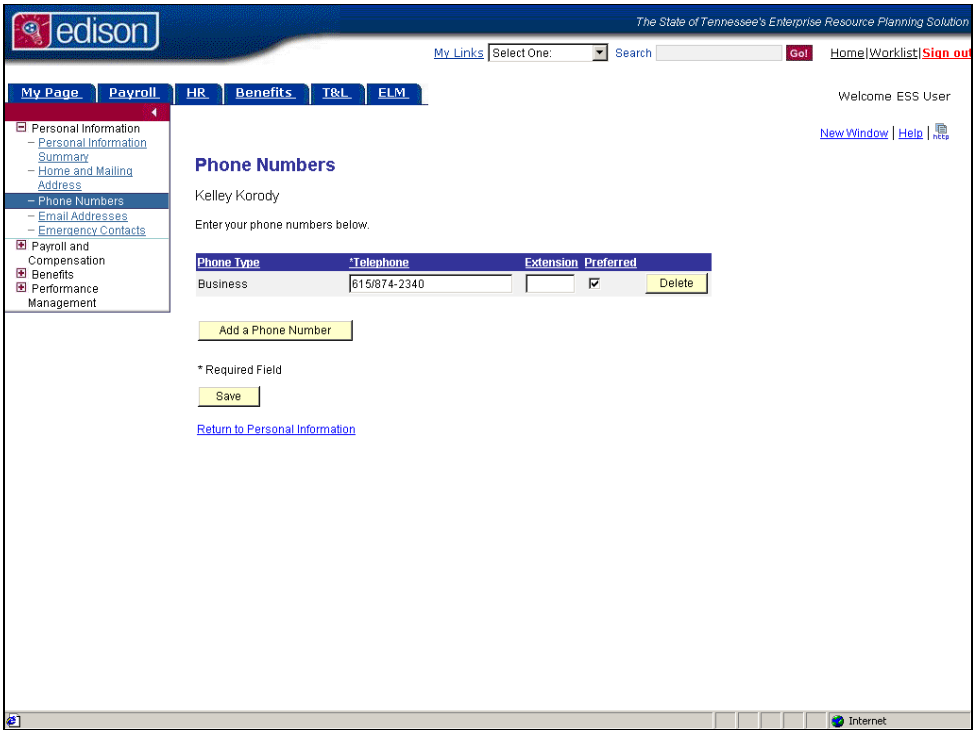
Kelley Korody will be used as an example in this lesson.



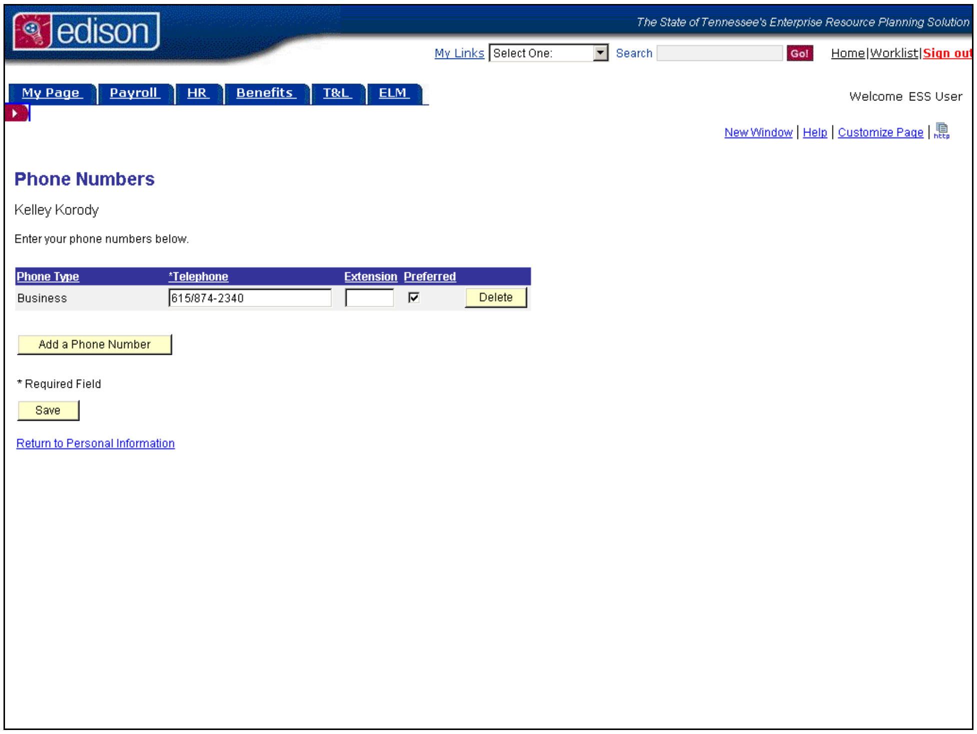
Step	Action
1.	Begin by clicking on the **Employee Self Service** link. Employee Self Service



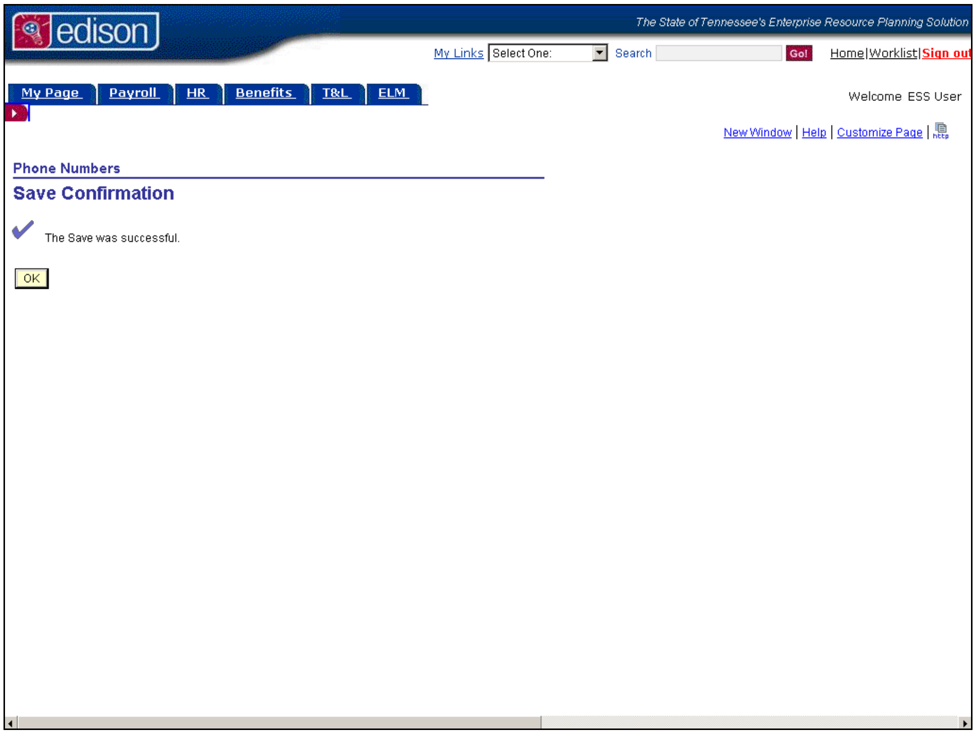
Step	Action
2.	Click the **Personal Information** link. Personal Information
3.	Click the **Phone Numbers** link. Phone Numbers



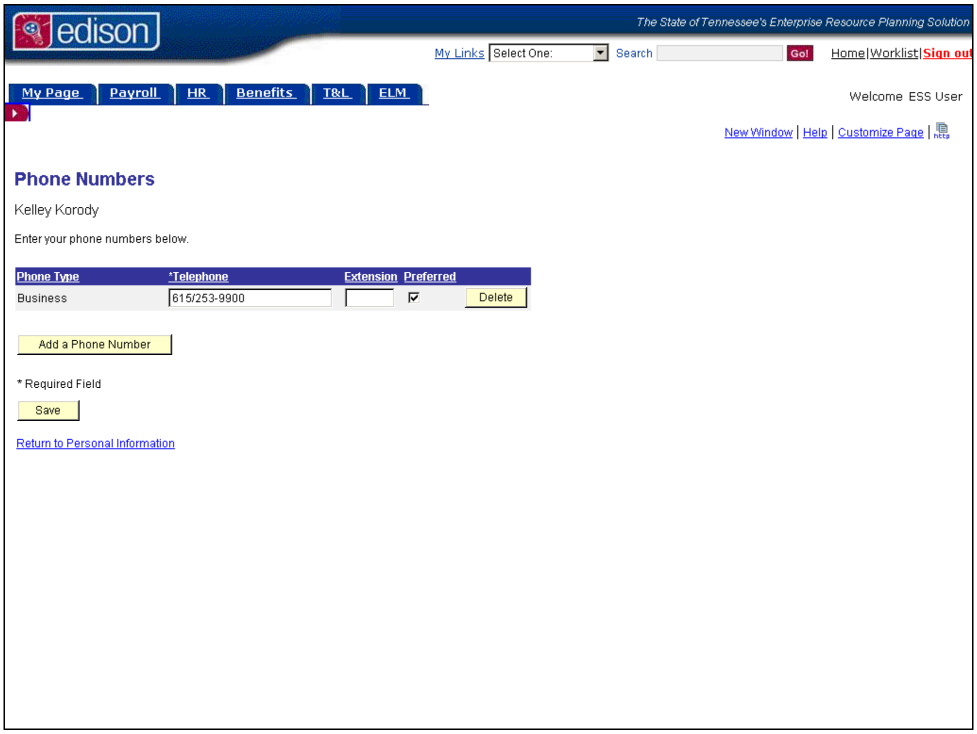
Step	Action
4.	Click the **Collapse** button to enlarge the screen 
5.	On the **Phone Numbers** page, the system shows all phone numbers currently stored in the Edison system. This employee only has one **Phone Number** stored in the Edison system.

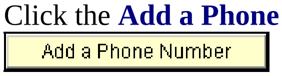


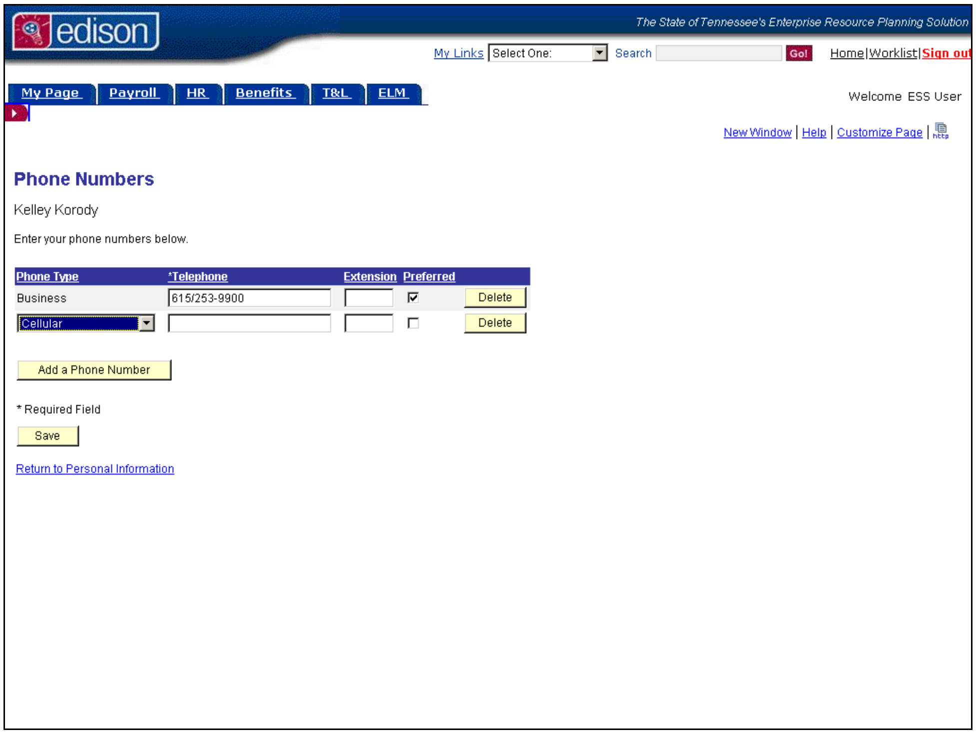
Step	Action
6.	In this example, Kelley needs to update her business **Telephone** number. Click in the **Telephone** field. **Note:** For this example, the field will be cleared once you click into it. 615/874-2340
7.	Enter the desired information into the **Telephone** field. Enter "**6152539900**".
8.	The **Extension** field is used when the telephone number has an associated **Extension** tied to it.
9.	In the event that the State of Tennessee needs to call an employee, the **Preferred** checkbox indicates which telephone number the employee would like the State to call first. If only one telephone number is stored, this checkbox will automatically be checked. If additional numbers are added, the employee can designate the appropriate phone number as **Preferred**. **Note:** An employee can have only one **Preferred** number.
10.	Click the **Save** button. Save



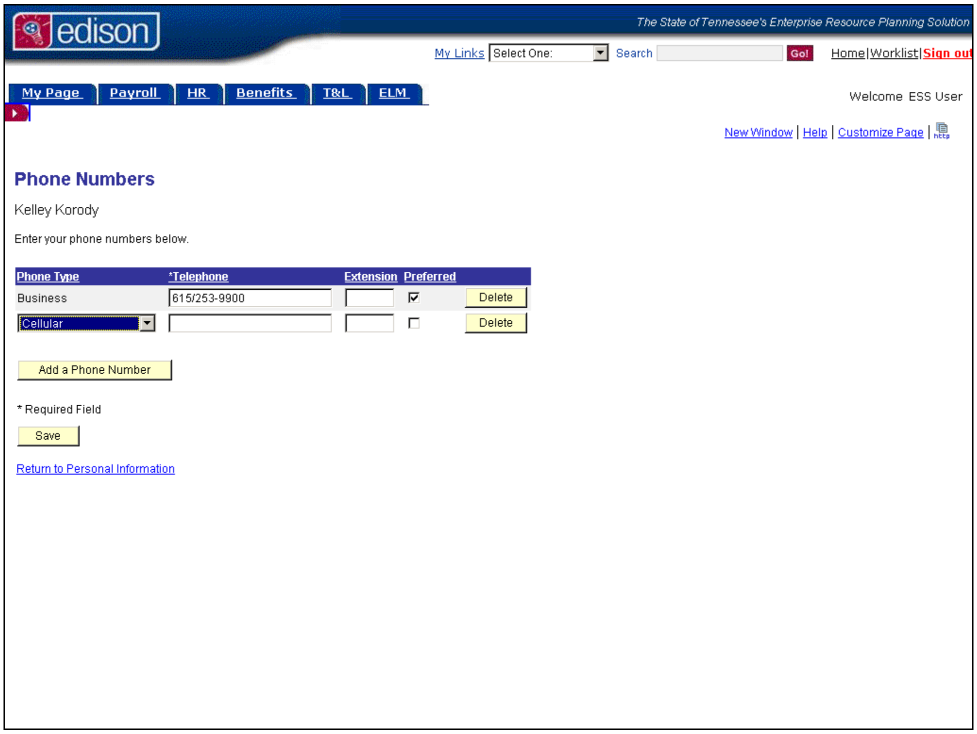
Step	Action
11.	Click the **OK** button. 
12.	Notice how the system automatically converted the **Telephone** number into the required Edison format.

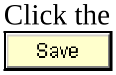


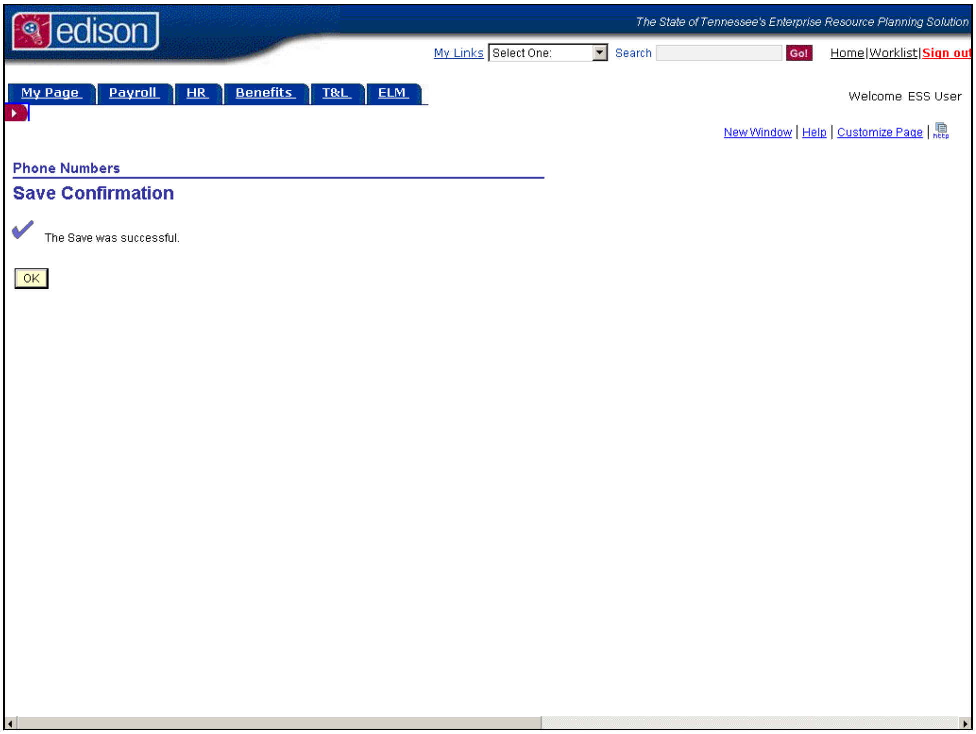
Step	Action
13.	Now let's add Kelley's cellular phone number to the Edison system. Click the **Add a Phone Number** button. 
14.	The **Phone Type** indicates the type of phone number being stored. Click the **Phone Type** drop down list to display valid phone types. 
15.	Select the **Cellular** list item. 
16.	**Edison** automatically formats a phone number in the required format. For example, if you key in the **Telephone** number of **6158354281**, it will automatically convert to the required Edison format of **615/835-4281** once you click the **Save** button.



Step	Action
17.	Click in the **Telephone** field. 



Step	Action
18.	Enter"**6158354281**" into the **Telephone** field.
19.	Click the **Save** button. 



Step	Action
20.	Click the **OK** button. 
21.	You have successfully completed viewing, updating and adding a **Phone Number** to the existing record. **End of Procedure.**

My Paycheck

Direct Deposit - View, Update & Add

Direct Deposit allows depositing the paycheck amount electronically to the respective financial institutions such as a bank or credit union. Employees can add or update their direct deposit information using Self Service.

Direct Deposit enforces the following aspects on State of Tennessee employees:

- Requires the employee to have at least one account type with the deposit type option as "Balance".

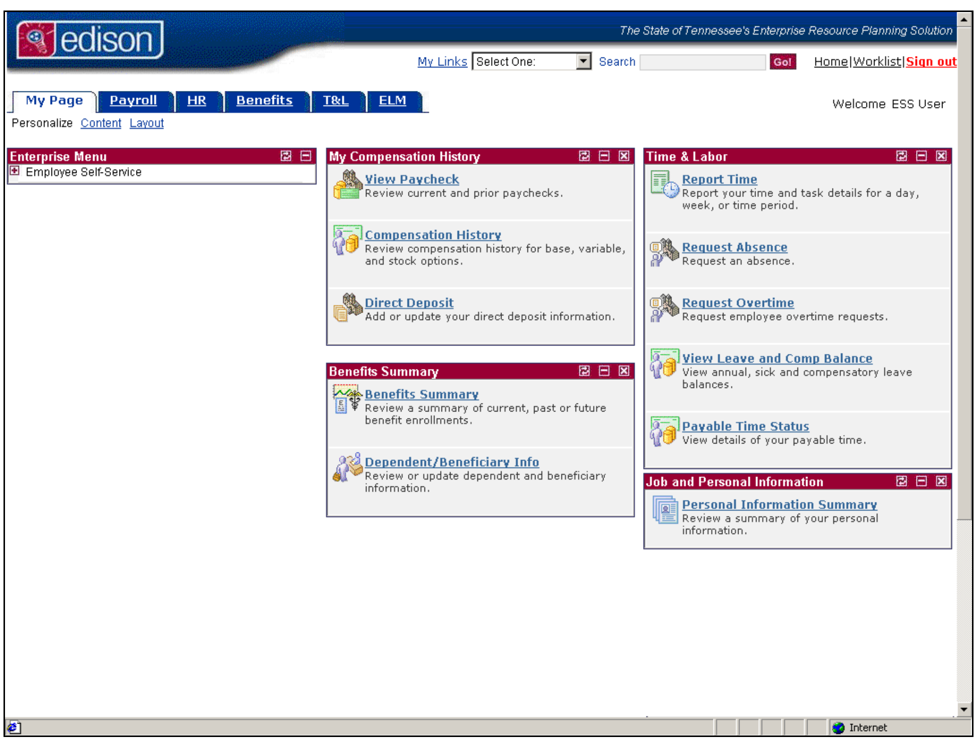
- Allows up to three (3) direct deposit entries.

- Direct Deposits can be applied to checking, savings or credit union accounts.

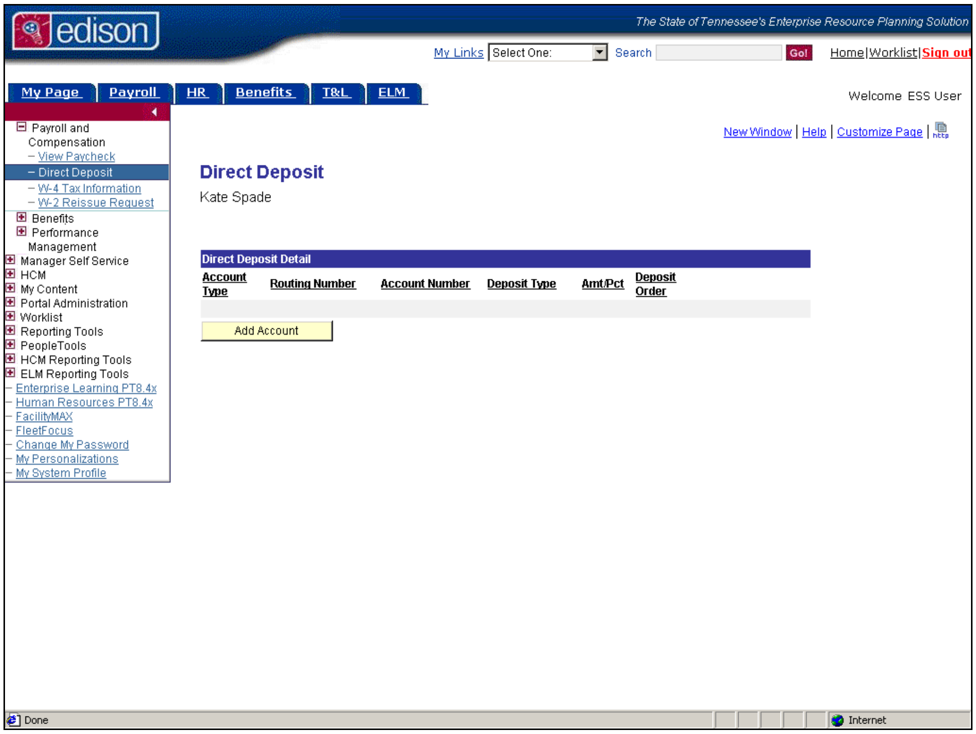
- Existing direct deposit policy will be enforced.

Procedure

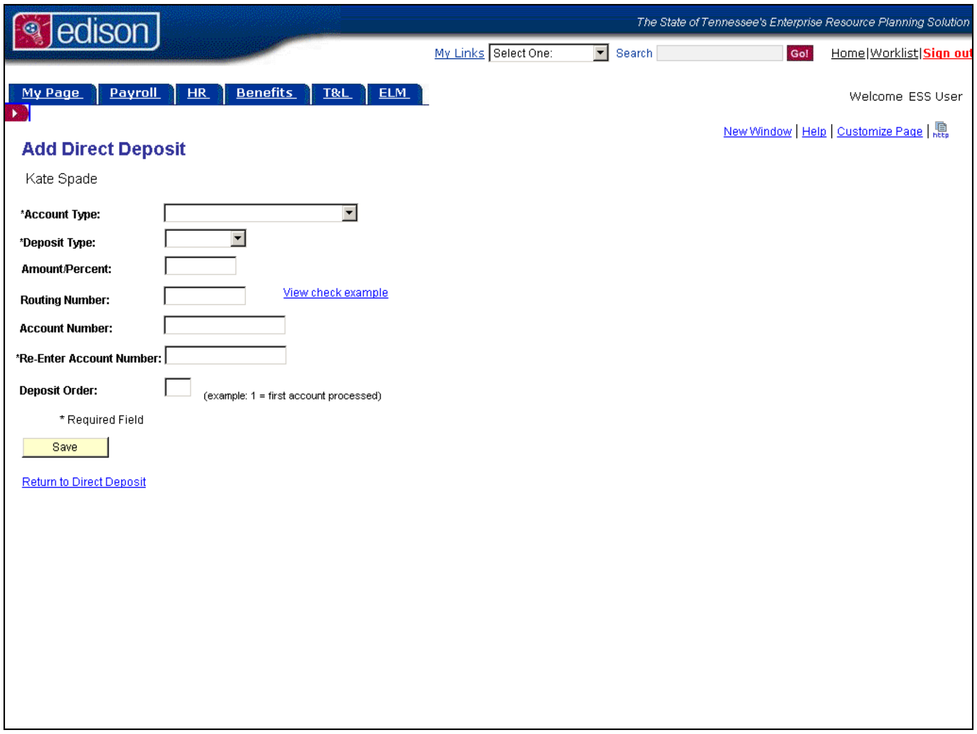
Kate Spade will use Self Service to add her direct deposit account information.



Step	Action
1.	Click the **Direct Deposit** link. Direct Deposit

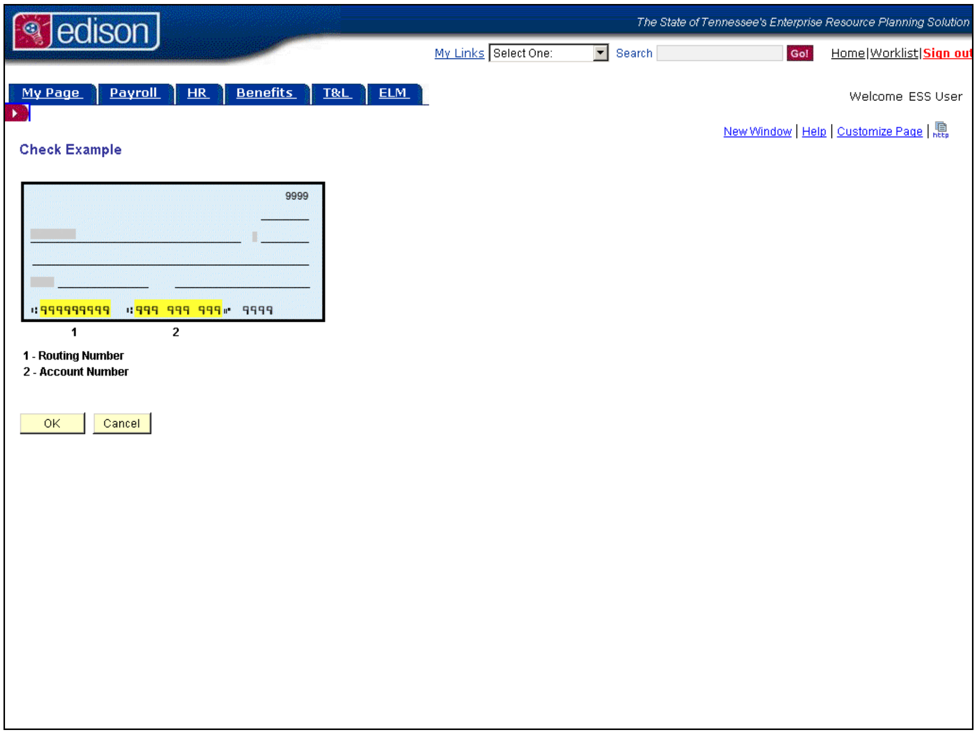


Step	Action
2.	Click the **Collapse** button.
3.	In this example, Kate will deposit 90% of each paycheck to her checking account and send the remainder, or **balance**, to her savings account.
4.	Click the **Add Account** button. Add Account

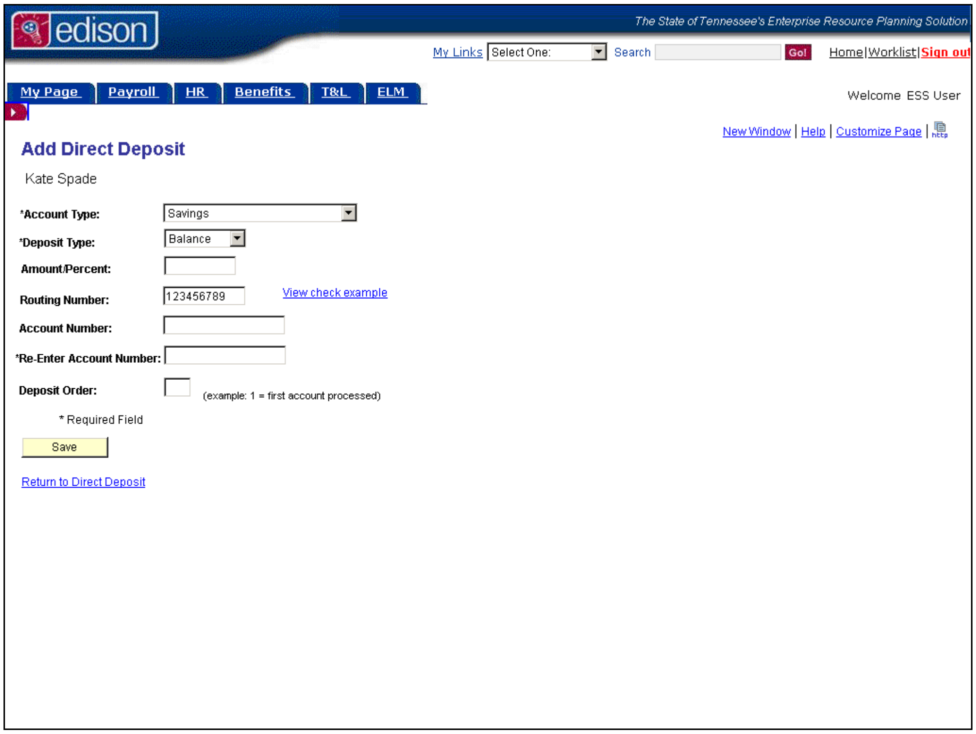


Step	Action
5.	Click the **Account Type** list.
6.	Click the **Savings** list item. Savings
7.	Click the **Deposit Type** list.
8.	If you would like to have a specific amount deposited to this account, you would select **Amount**. If you would like to deposit a percentage of your paycheck to this account, you would select **Percent**. Selecting the **Balance** option means that any money left over after the other money in your paycheck has been deposited will go to this account. You will also select **Balance** as the **Deposit Type** if you are only setting up one account. **Note: In order to ensure that all the money in your paycheck is accounted for, Edison requires the Deposit Type to be Balance for the first account that you set up.**

Step	Action
9.	Because this is the first account that Kate is entering, she will select **Balance**, as required by Edison. Click the **Balance** list item. Balance
10.	Selecting ***Deposit Type** as "Amount" requires the **Amount/Percent** field to be a dollar value. If you select ***Deposit Type** as "Balance" then the **Amount/Percent** field must be blank. If you select ***Deposit Type** as "Percent" then the **Amount/Percent** field must be a numeric value not to exceed 99. In this case, we will leave this field blank because we selected the ***Deposit Type** of "Balance"
11.	The **Routing number** must be a valid bank identification number; sometimes called Transit ID. The system will validate the **Routing Number**. It must be 9 digits in length.
12.	Click in the **Routing Number** field.
13.	Enter the desired information into the **Routing Number** field. Enter "**123456789**".
14.	Click the **View check example** link. View check example
15.	Upon clicking the **View Check Example** link, you can see the example of a check highlighting the **Routing and Account Number**. The **Routing number** would be the first 9 digit number followed by a varying digit **Account number**.

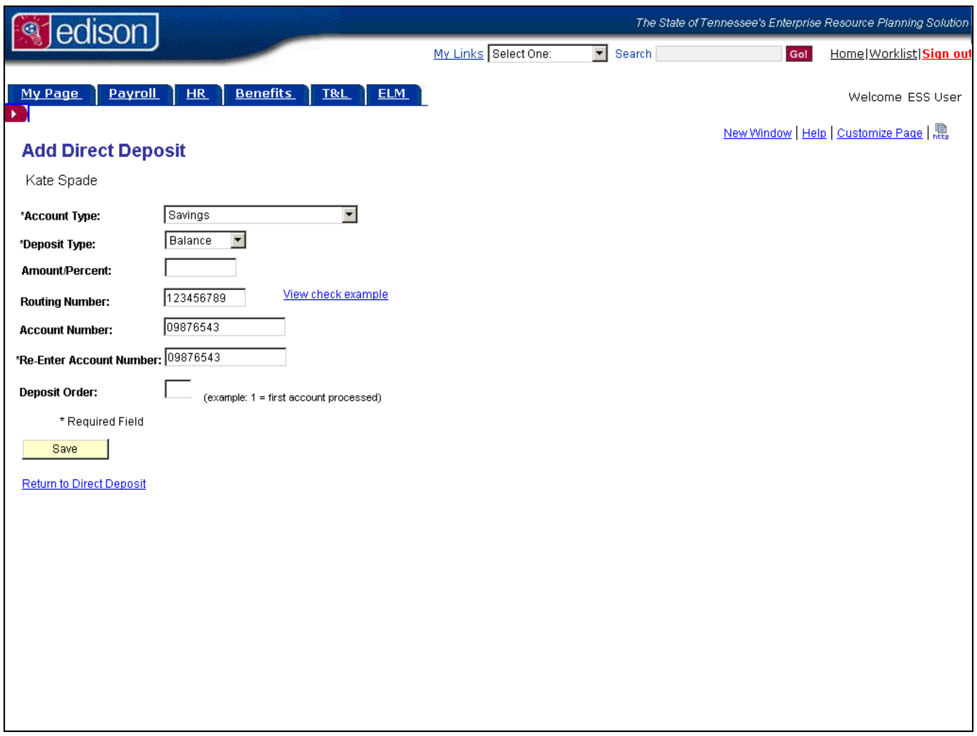


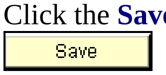
Step	Action
16.	Click the **OK** button. OK

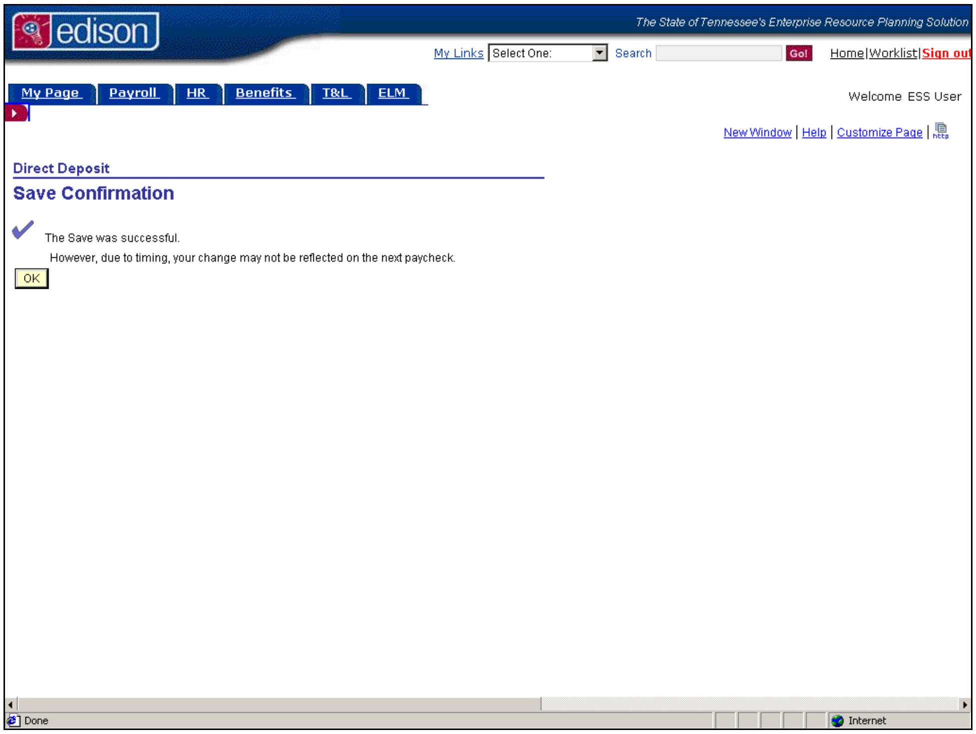


Step	Action
17.	**Account Number** is your Savings or Checking account number. **Note:** The system cannot validate this number. Click in the **Account Number** field.
18.	Enter the desired information into the **Account Number** field. Enter "**09876543**".
19.	***Re-Enter Account Number:** is used to confirm the **Account Number** previously entered.
20.	Click in the ***Re-Enter Account Number** field.
21.	Enter the desired information into the ***Re-Enter Account Number** field. Enter "**09876543**".

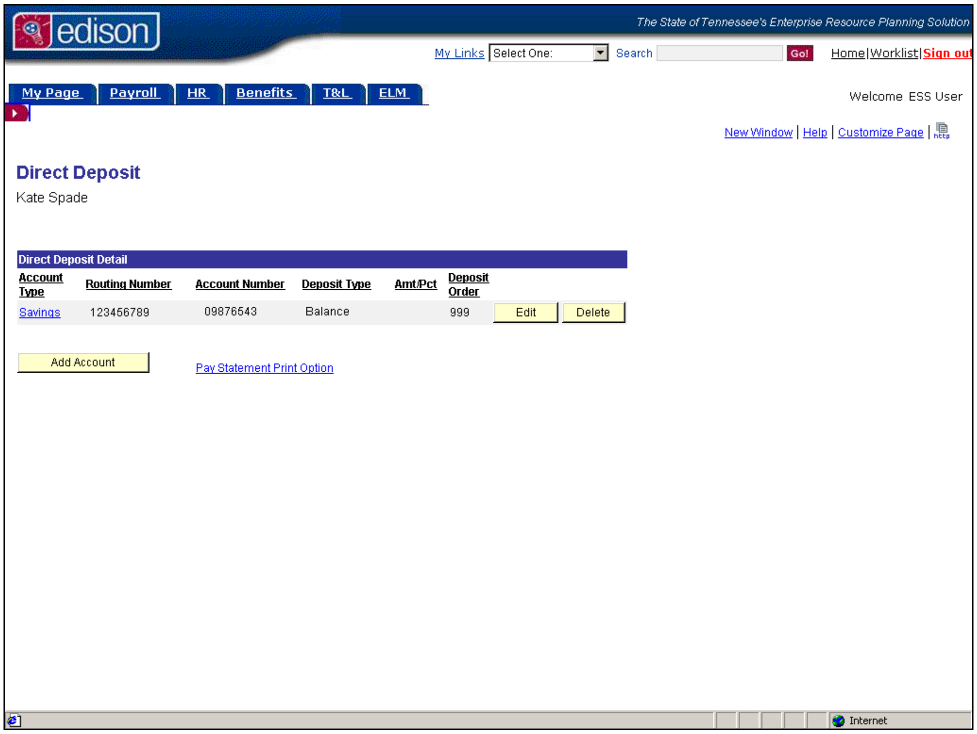
Step	Action
22.	**Edison** allows employees to enter up to three direct deposits. The **Deposit Order** field determines which deposit will be taken first, if multiple account types are selected. In this example, Kate Spade has chosen her savings account to be the balance account. Because the balance account is always the last account to be deposited to, you don't have to enter a number in this field for this account. Edison will automatically assign the deposit order.



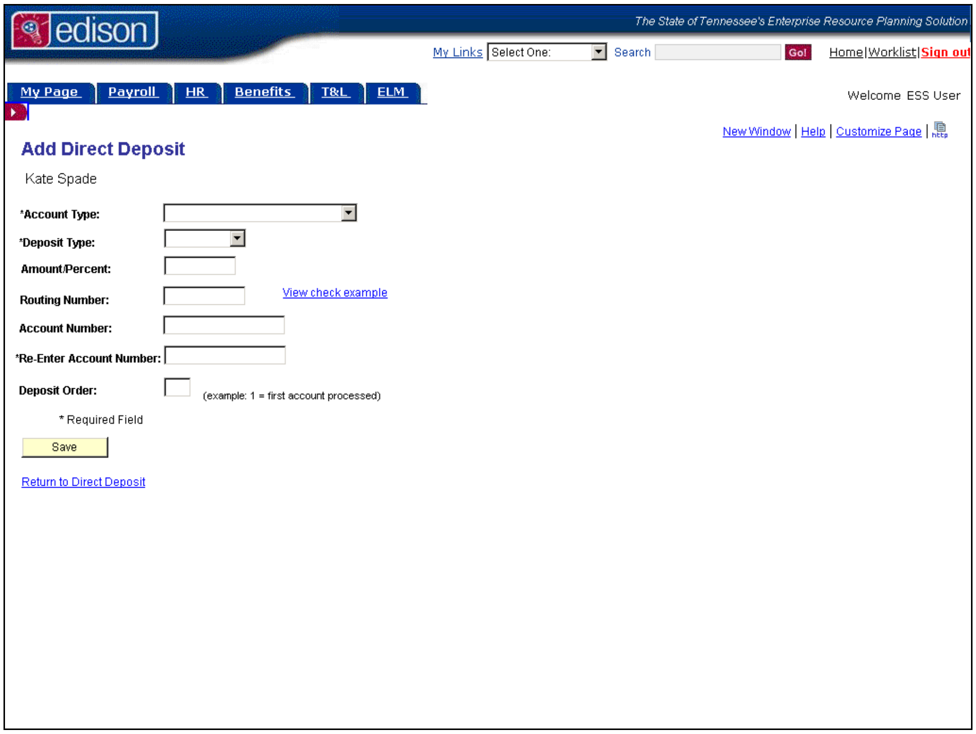
Step	Action
23.	Click the **Save** button. 



Step	Action
24.	Click the **OK** button. 
25.	When the ***Deposit Type** of "Balance" is selected then the **Deposit Order** will default to "999" which indicates that it will be the last transaction processed.

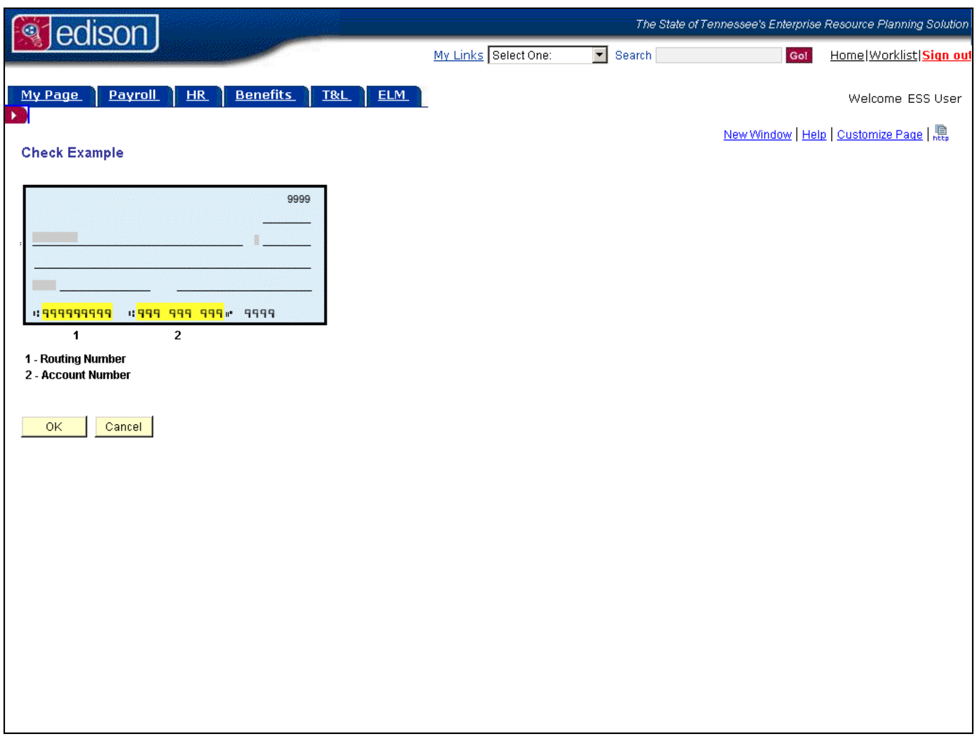


Step	Action
26.	Click the **Add Account** button to add another account for **Direct Deposit**. In this case, we will add a **Direct Deposit** entry for Kate Spade's checking account. Add Account

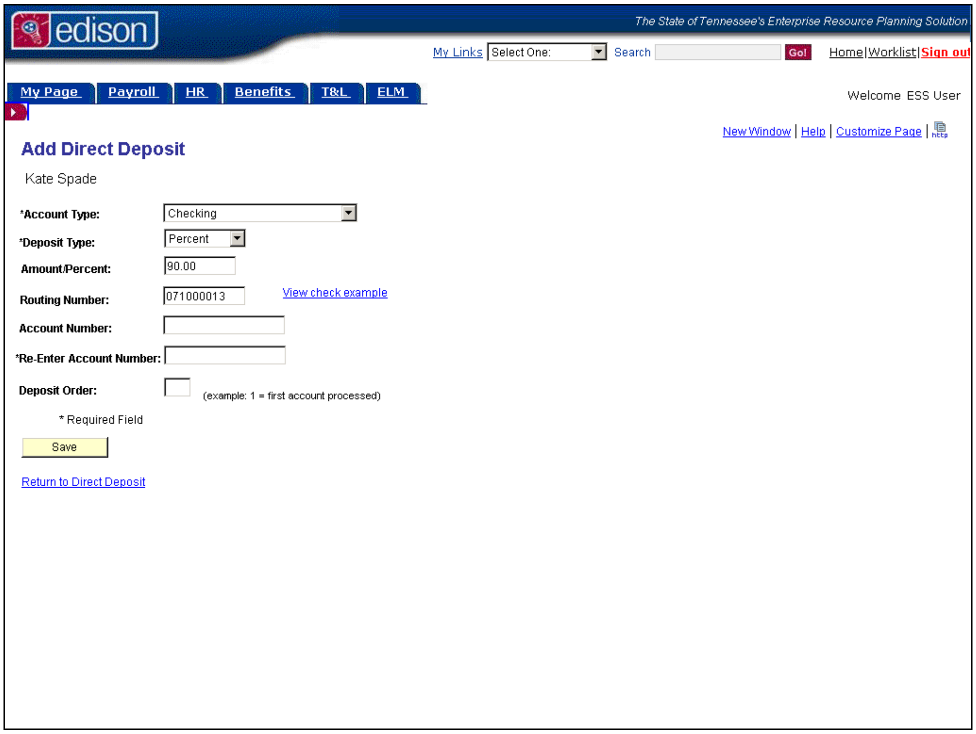


Step	Action
27.	Click the ***Account Type** list.
28.	Click the **Checking** list item. Checking
29.	Click the ***Deposit Type** list.
30.	Click the **Percent** list item. Percent
31.	Selecting ***Deposit Type** as "Amount" requires the **Amount/Percent** field to be a dollar value. If you select ***Deposit Type** as "Balance" then the **Amount/Percent** field must be blank. If you select ***Deposit Type** as "Percent" then the **Amount/Percent** field must be a numeric value not to exceed 99.
32.	Click in the **Amount/Percent** field.

Step	Action
33.	Kate would like 90% of her paycheck to go to checking. Because she has selected savings as her balance account, the final 10% of her check will go to savings. Enter the desired information into the **Amount/Percent** field. Enter "**90**".
34.	Click in the **Routing Number** field.
35.	Enter the desired information into the **Routing Number** field. Enter "**071000013**".
36.	Click the **View check example** link. View check example
37.	Upon clicking the **View Check Example** link, you can see the example of a check highlighting the **Routing and Account Number**. The **Routing number** would be the first 9 digit number followed by a varying digit **Account number**.

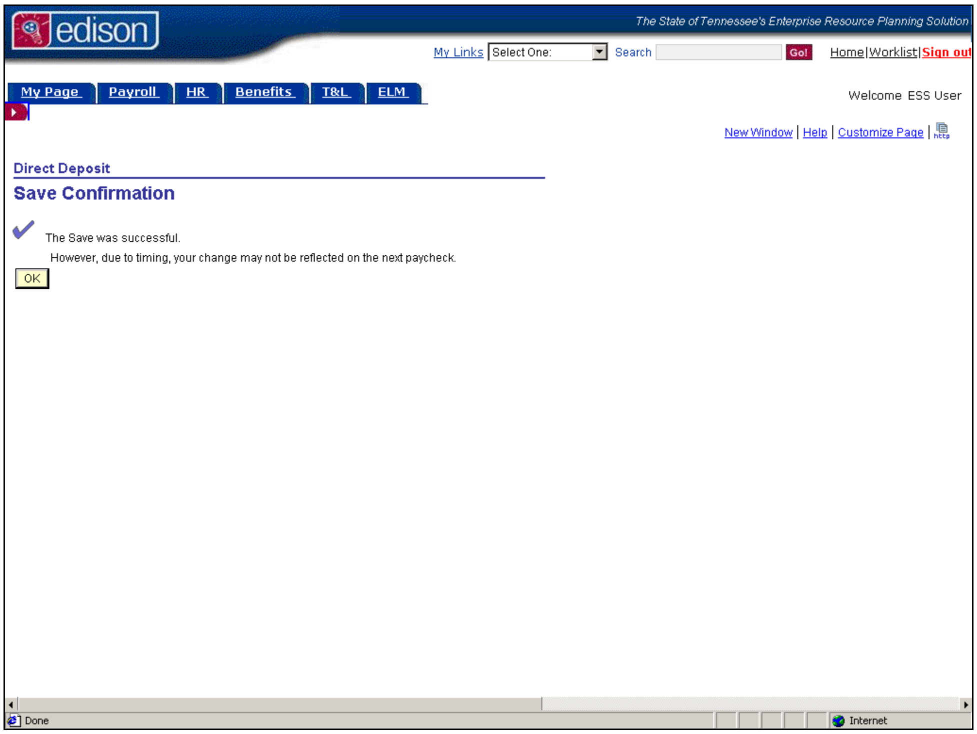


Step	Action
38.	Click the **OK** button. OK



Step	Action
39.	Click in the **Account Number** field.
40.	Enter the desired information into the **Account Number** field. Enter "**12345678**".
41.	***Re-Enter Account Number:** is used to confirm the **Account Number** previously entered.
42.	Click in the ***Re-Enter Account Number** field.
43.	Enter the desired information into the ***Re-Enter Account Number** field. Enter "**12345678**".
44.	Click in the **Deposit Order** field.

Step	Action
45.	Kate would like her checking account to be first in the deposit order. Enter the desired information into the **Deposit Order** field. Enter "**1**".
46.	Click the **Save** button. 



Step	Action
47.	Click the **OK** button. 
48.	You have successfully completed a savings and checking account entry for **Direct Deposit**. **End of Procedure.**

Paycheck - View and Print

Edison will allow employees to review their paycheck details using Self Service for current and previous pay cycles.

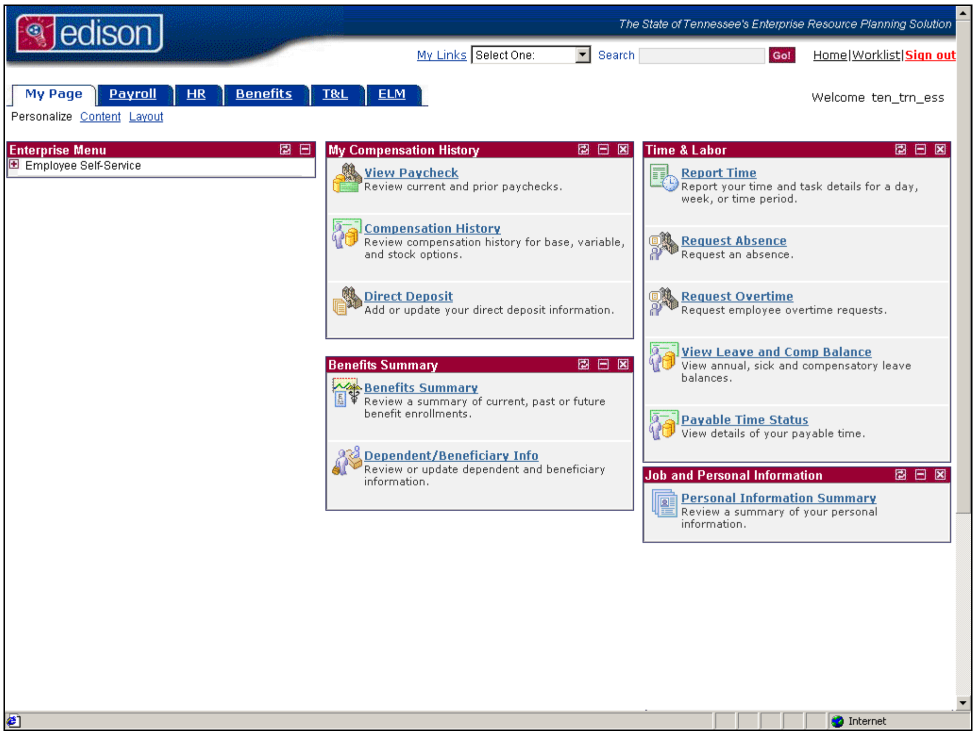
The information displayed will show the details of a paycheck for a specific pay cycle.

If you have additional questions about your paycheck, please contact the Central Payroll Call Center at 615-741-PAID or 866-944-3873.

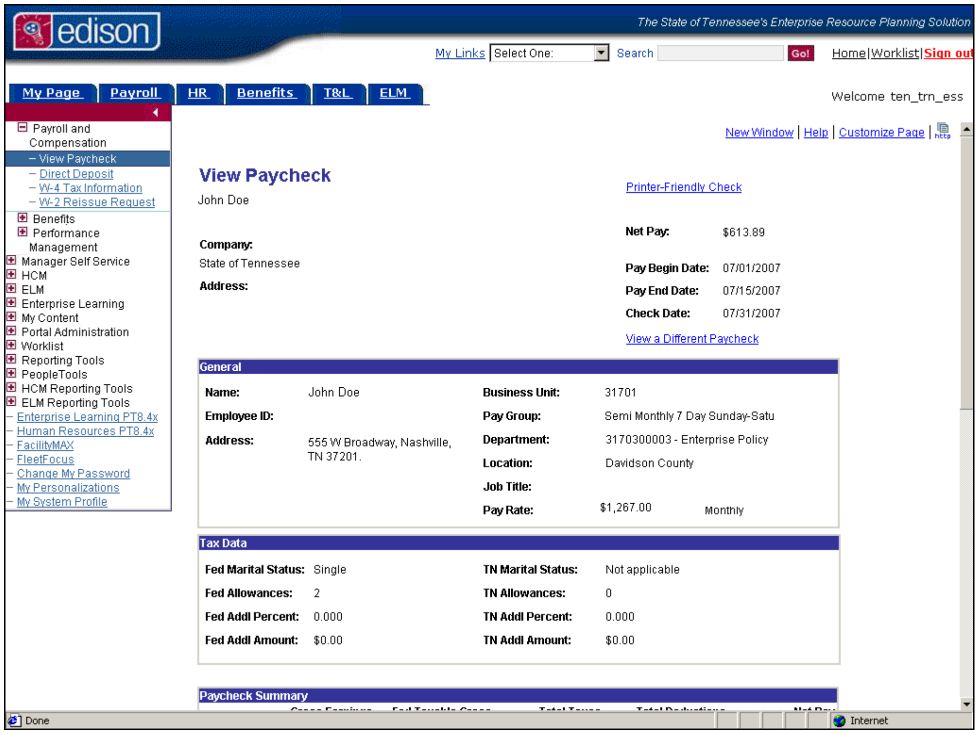
Procedure

In this lesson, you will learn how to view Paycheck information.

John Doe will be used in the example.



Step	Action
1.	To begin, click on the **View Paycheck** link. View Paycheck



Step	Action
2.	Click the **Collapse** button to enlarge the screen. 
3.	The **View Paycheck** page displays the general, tax data, and paycheck summary information. **Note:** The system will automatically display the most recent paycheck.
4.	This section displays the **Net Pay** amount for this paycheck, **Pay Period** and **Check Date** dates.
5.	Click on the **Printer-Friendly Check** link to print the paycheck information.
6.	Clicking on the **View a Different Paycheck** link will allow the employee to view a paycheck from a prior pay period. **Note:** This will only display information for paychecks processed in Edison.
7.	The **General** Section displays the details of Employee **Name**, **Employee ID** (also known as Person ID), **Address**, **Business Unit**, **Pay Group**, **Department**, **Location**, **Job Title** and **Pay Rate**. This information is taken from **Personal Data** and from **Job Data** information in the **Edison HR** System.

Step	Action
8.	The **Tax Data s**ection displays the employee's marital status for both federal and state income tax purposes. It also displays the number of **Federal Allowances** (exemptions) and **State Allowances** (exemptions) to be used to calculate the paycheck. If additional amounts are being withheld for federal and/or state taxes, they are also displayed in this section.
9.	Click the **Scroll bar** to see the rest of the information.
10.	The **Paycheck Summary s**ection provides the details of both the **Current** paycheck and the respective **YTD** totals (Year-to-Date Amounts). The **Current and YTD** (Year-to-Date) rows in the **Paycheck Summary** section display the details of **Gross Earnings**, **Fed Taxable Gross**, **Total Taxes**, **Total Deductions** and **Net Pay.**
11.	The **Earnings s**ection displays the different types of **Earnings** (Regular, Overtime, Longevity), number of **Hours** (optional), **Rate** (optional) and the respective dollar **Amount** for the **Current** pay period and the **YTD Amount**.
12.	The **Taxes s**ection displays the different types of taxes withheld and the respective dollar **Amount** and **Year-to-Date Amount**.
13.	The **Before-Tax s**ection lists any deductions that are taken before the income tax is calculated. This section displays various types of **Tax deductions** and the corresponding **Amount** and **Year-to-date Amount**. Examples of **Before Tax Deductions** are 401K Deductions and FSA Deductions. The **After Tax Deductions** section lists all the voluntary deductions for the employee for this pay period. This section displays the different types of **After Tax Deductions** and the corresponding **Amount** and **Year-to-date Amount**. Examples of **After Tax Deductions** are Term Life deductions, LTC deductions, United Way and Special Olympics for this pay period.
14.	The **Employer Paid Benefits** section provides a list of all the benefits paid by the employer for the employee. For example, **Employer Paid Benefits** may include medical and retirement. **Employer Paid Benefits** displays the **Types of Employer Paid Benefits** and the corresponding **Amount** and **Year-to-Date Amount**.

Step	Action
15.	The **Net Pay Distribution s**ection provides information about the distribution of the paycheck. The **Net Pay Distribution** displays **Payment Type** (Direct Deposit/ Advice), **Paycheck Number** (System generated number assigned to this paycheck), **Account Type** (Savings or Checking), **Account Number** (Employee's bank account number that received the deposit) and **Amount** (Dollar value that was deposited for this check). If an employee has multiple direct deposits, the information for each account will be shown here.
16.	If you have questions about your paycheck, call the **Central Payroll Call Center** at 615-741-PAID or 866-944-3873.
17.	You have successfully viewed your Paycheck information. **End of Procedure.**

W-2 - Request a Re-issue

Edison will allow employees to ask for the re-issuance of their W-2 form using Self Service.

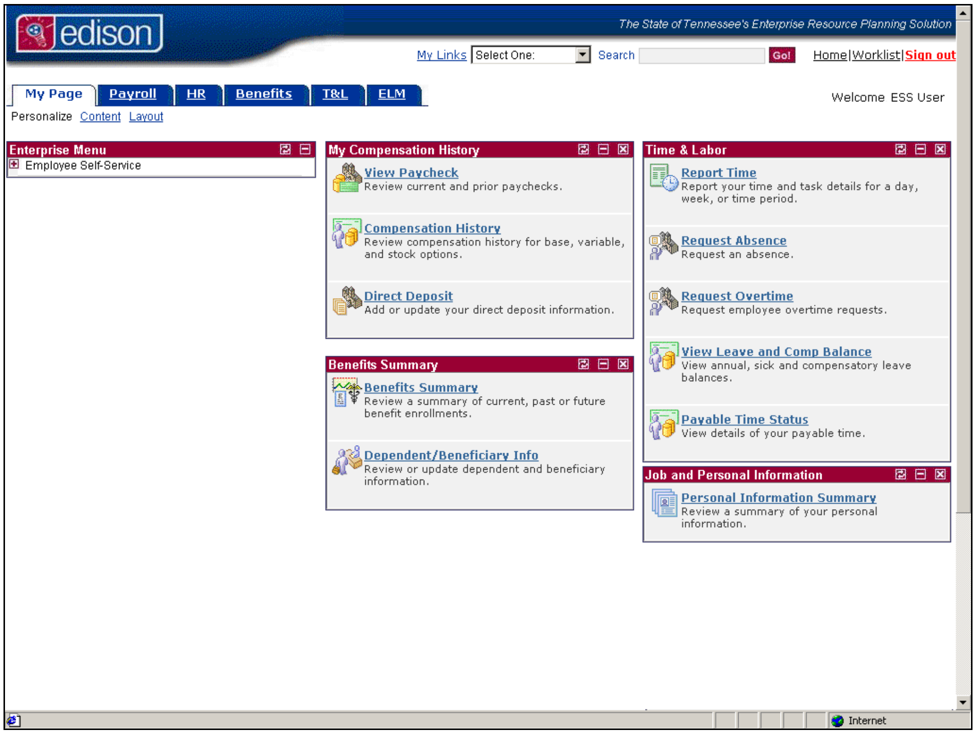
Edison will look up an employee social security number based upon their Person Id and Name. It will display the kinds of addresses available in the system such as Home/mailing/work location for that respective employee. Once the kind of address is identified, the system will pull the specific information needed from the employee's personal data information.

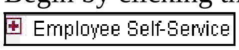
Employees can have the W-2 form mailed to their home address or work location or mailing address.

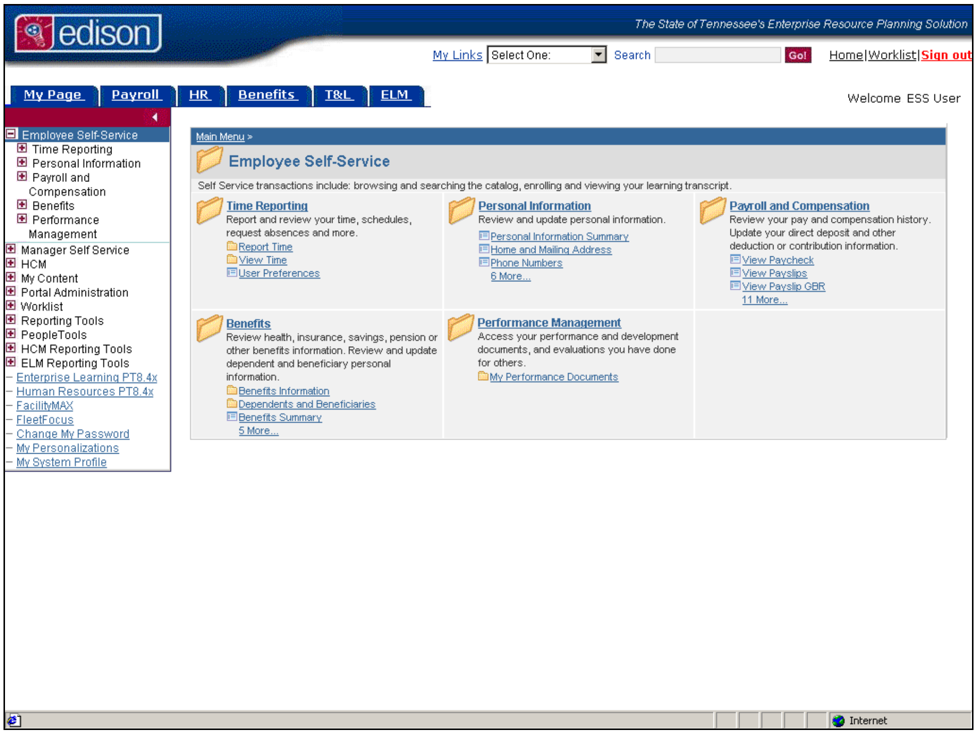
Procedure

In this lesson, you will learn how to request a re-issue of your W-2 form using Self Service.

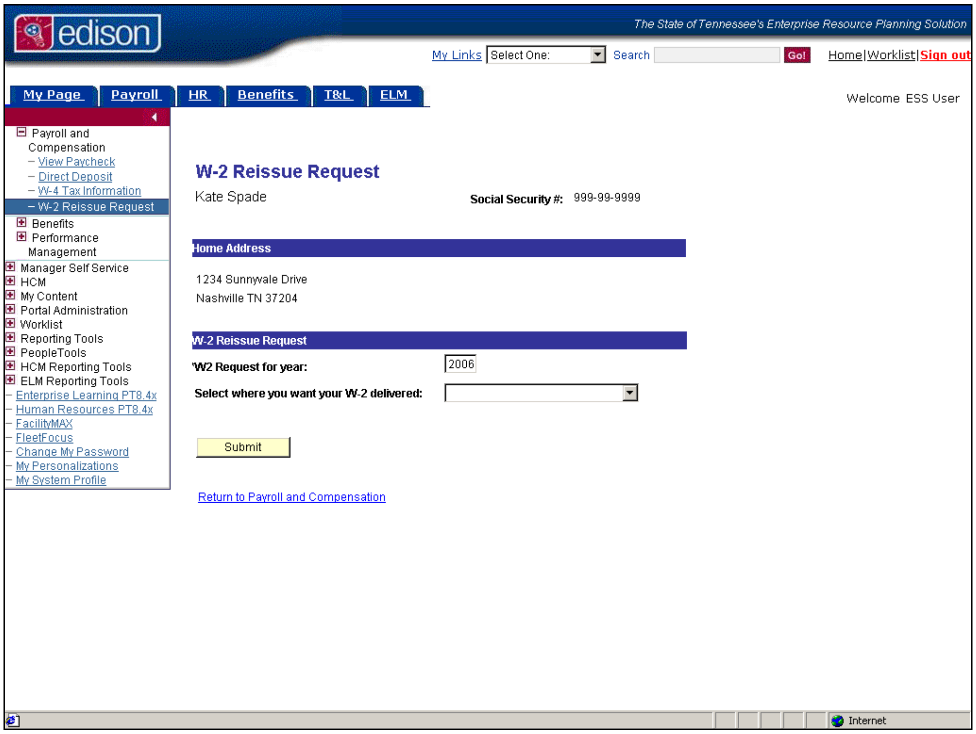
Kate Spade will be used as an example in this lesson.



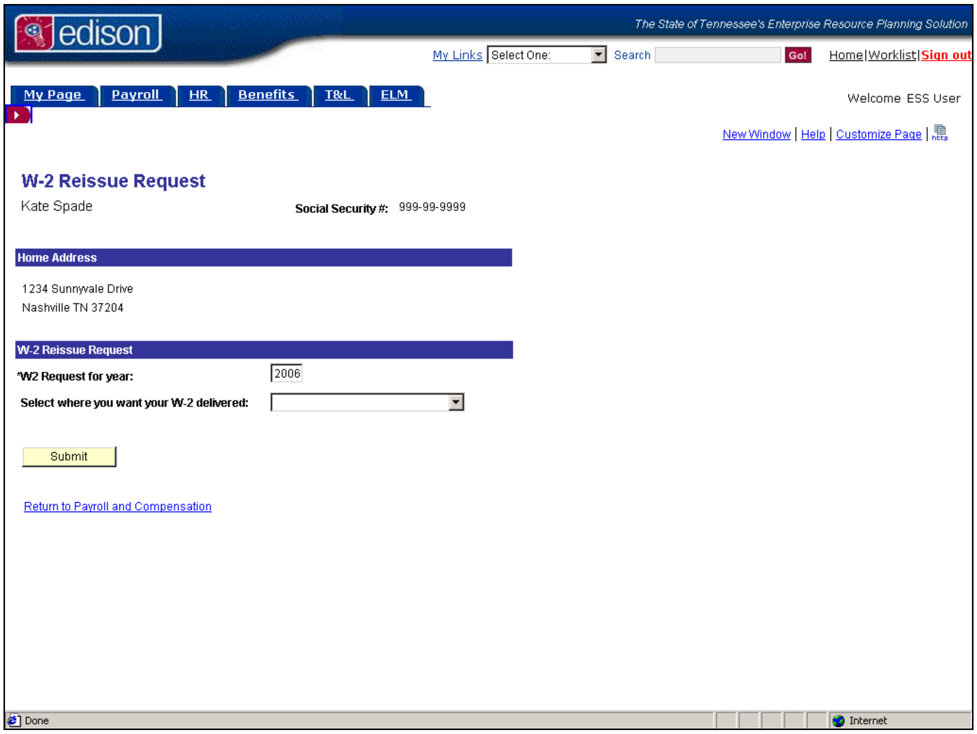
Step	Action
1.	Begin by clicking the **Employee Self Service** link. 



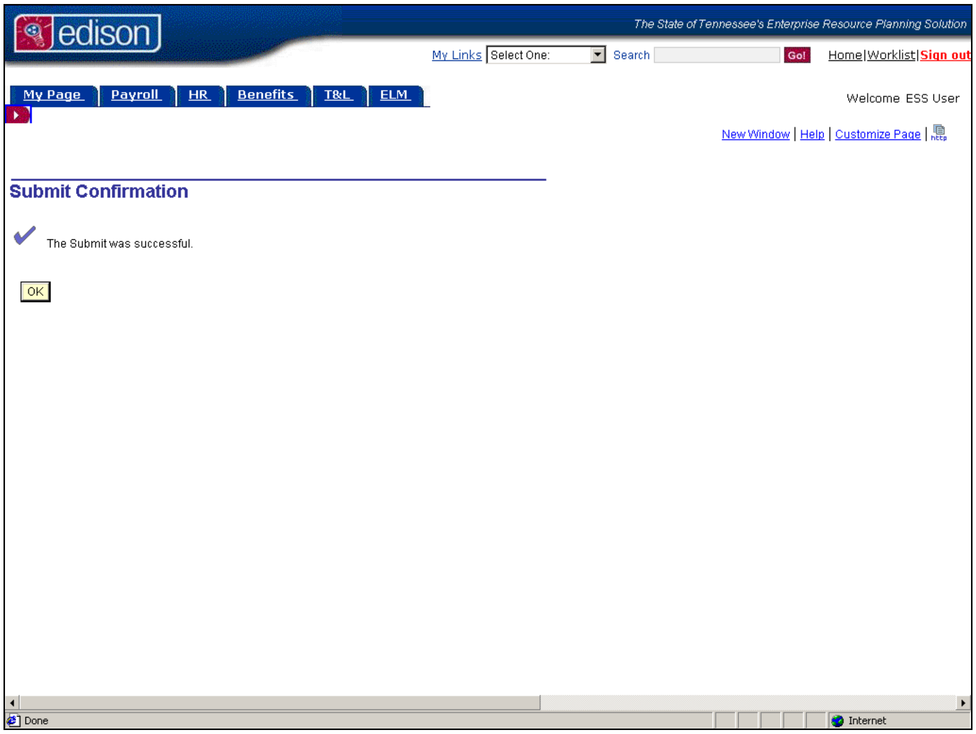
Step	Action
2.	Click the **Payroll and Compensation** link. Payroll and Compensation
3.	Click the **W-2 Reissue Request** link. W-2 Reissue Request



Step	Action
4.	Click the **Collapse** button. 
5.	Edison will default **W2 Request for year** to the previous year. For example, if the current year is 2007, **W2 Request for year** will default as 2006.



Step	Action
6.	Click the **Select where you want your W-2 delivered** drop down list.
7.	Kate Spade can get her W-2 delivered to one of the following addresses: -Home Address -Mailing Address -Work Location In this case, we are requesting the W-2 form to be delivered to her **Home** address. **Note**: Confirm the addresses are correct by accessing the **Personal Information** link in Self-Service.
8.	Click the **Home Address** list item. Home Address
9.	Click the **Submit** button. Submit



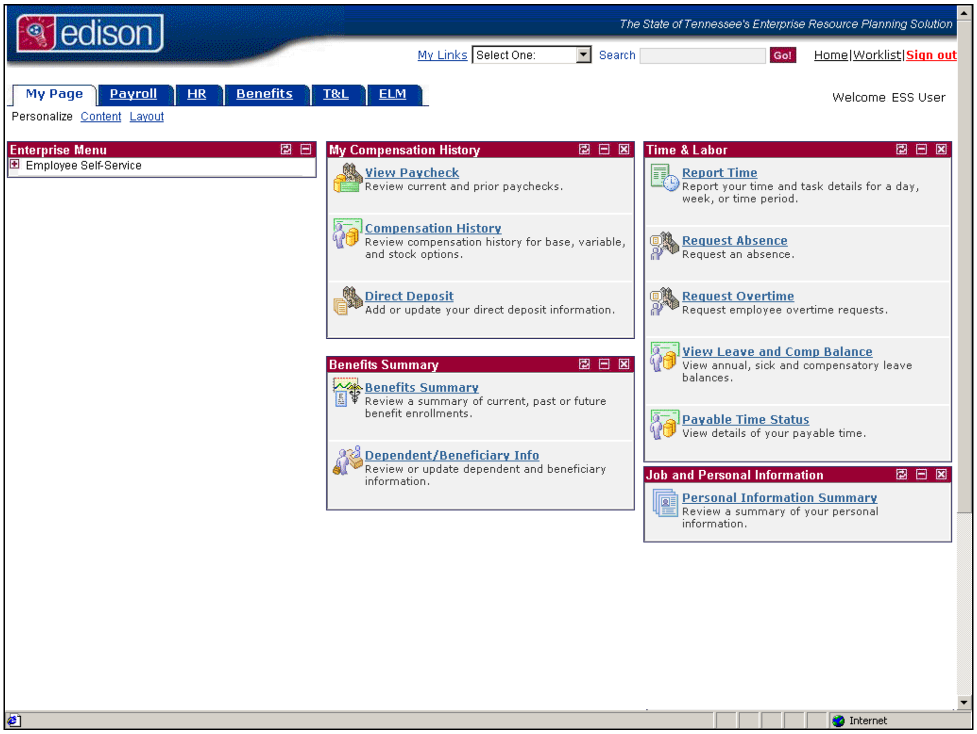
Step	Action
10.	Click the **OK** button. OK
11.	You have successfully completed a request to re-issue a **W-2 form**. **End of Procedure.**

W-4 Tax Information - View and Update

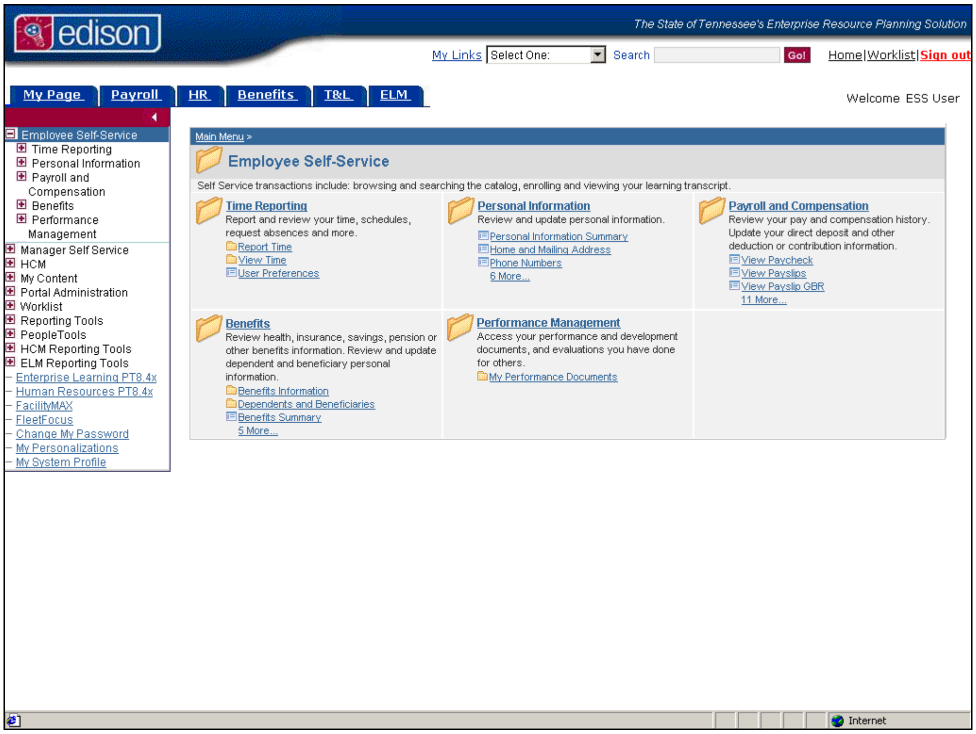
Employees can review and update their W-4 tax withholding information using Self Service. This will make it easier to keep the tax information up-to-date.

Procedure

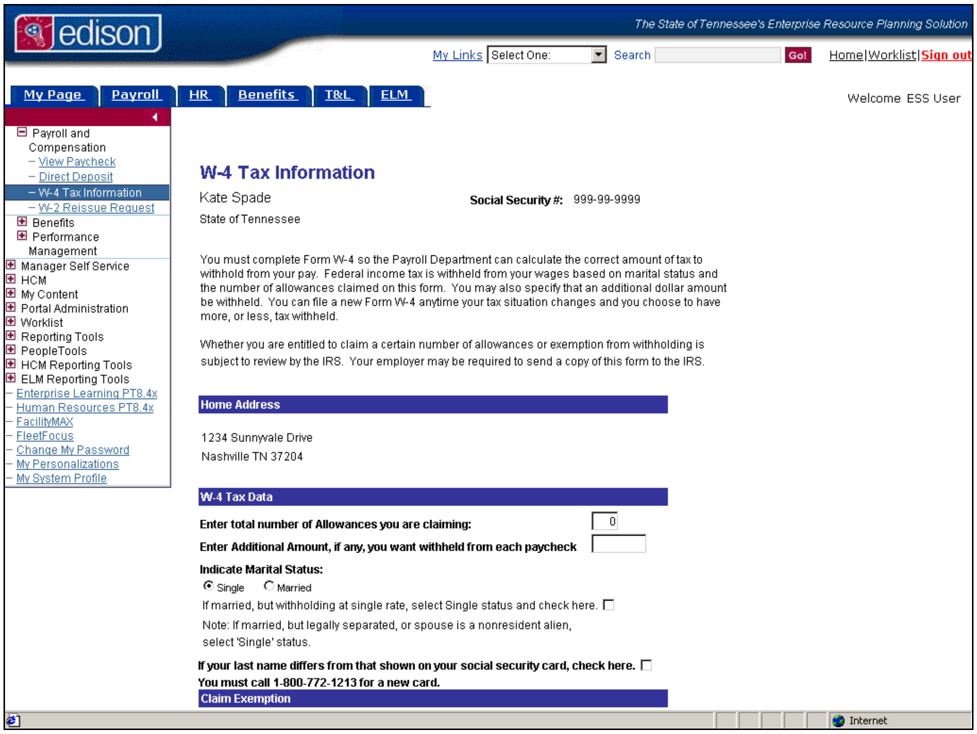
Kate Spade will review and update her W-4 Tax information.



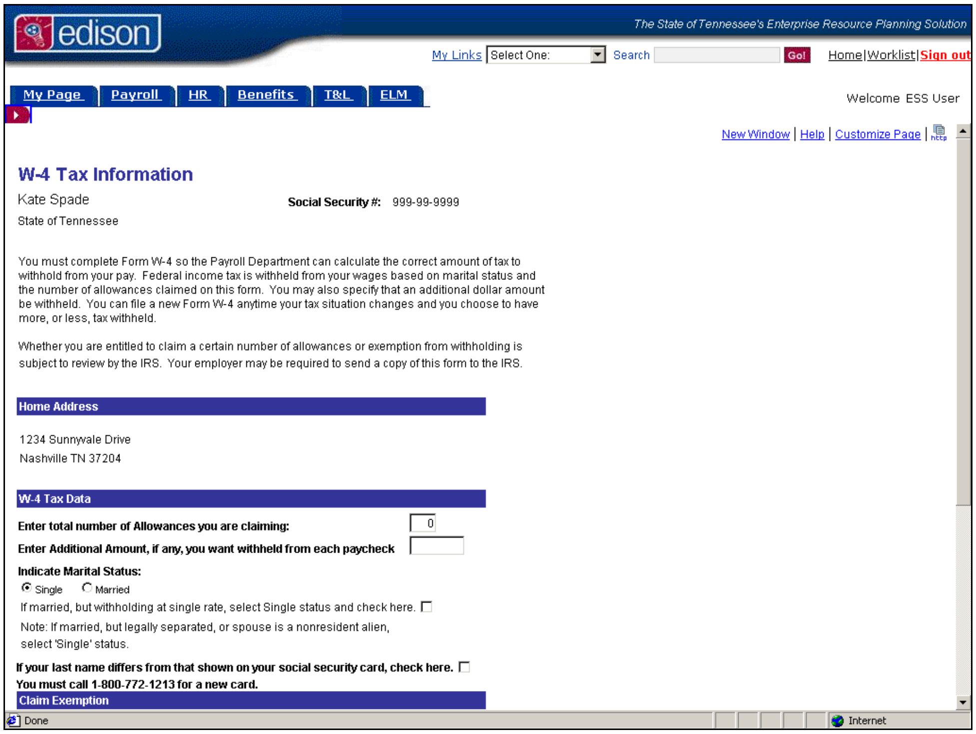
Step	Action
1.	Click the **Employee Self Service** link. Employee Self-Service



Step	Action
2.	Click the **Payroll and Compensation** link. Payroll and Compensation
3.	Click the **W-4 Tax Information** link. W-4 Tax Information

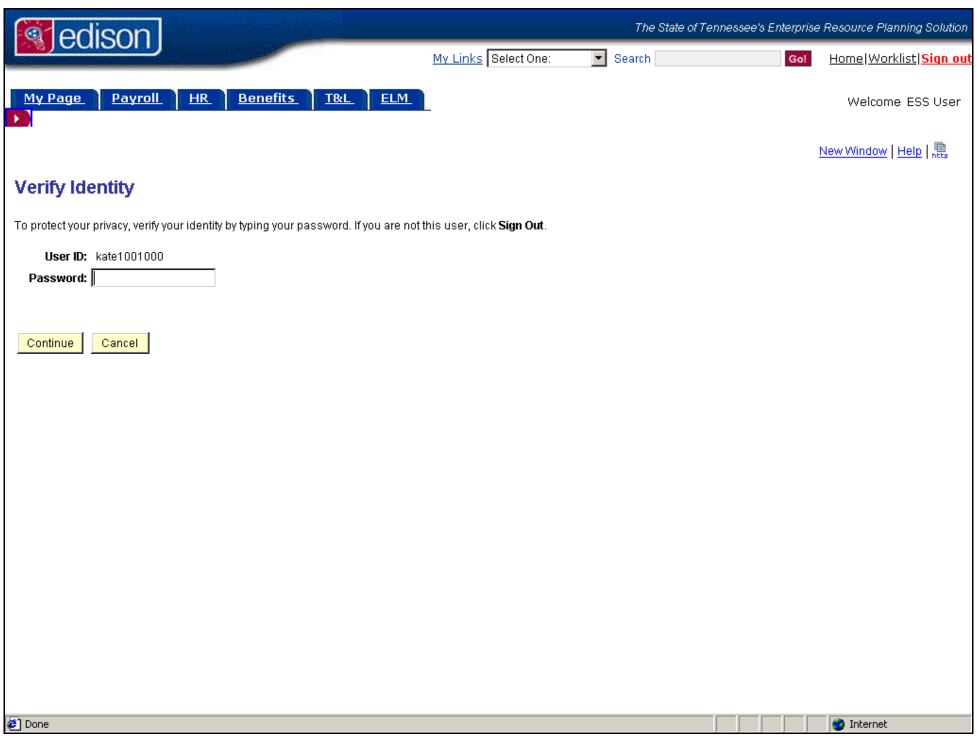


Step	Action
4.	Click the **Collapse** button. 
5.	**Allowances** are often thought of as the number of dependents you carry on your income tax. Sometimes, it is also referred to as the number of exemptions on your income tax. For example, if you are married and have one child then the number of allowances claimed would be 3. **NOTE:** The Federal Income Tax Law provides that a dependent can be claimed only on one person's income tax as an exemption.



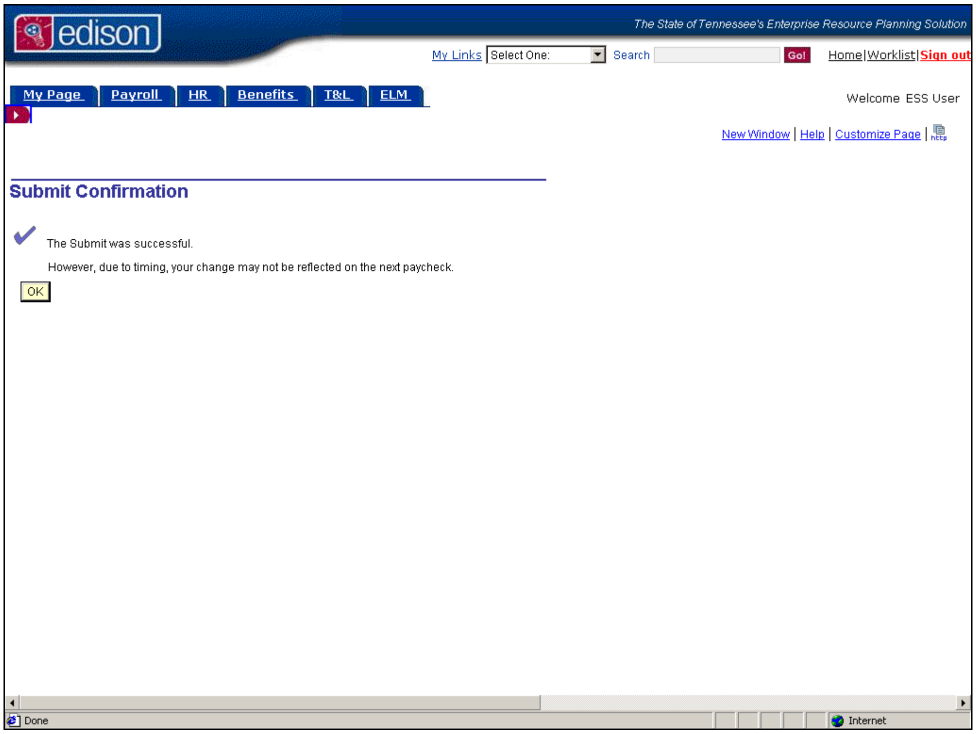
Step	Action
6.	Enter the desired information into the **Enter total number of Allowances you are claiming** field. Enter "**2**".
7.	This optional field is for employees who choose to withhold any additional amount over the regular taxes paid. **Note:** If at the end of the year, the total income puts you in a higher tax bracket than expected, you will have to pay additional Federal income tax. By entering an additional amount in this field, the system will withhold the specified amount from every paycheck and report it to the IRS. This allows employees to pay less income taxes at the end of the tax year.
8.	Edison defaults the **Marital Status** from the Personal Data information of the employee. If you need to change the **Marital status**, it will allow you to select that option.
9.	This field is optional. Check this field if you want your taxes to be withheld from the single tax table(Higher Tax rate).
10.	Click the scrollbar.

Step	Action
11.	This field is optional. You can skip this step if your last name shown above on this page is the same as your last name on your social security card. Otherwise, check the box and call **1-800-772-1213** for a new social security card with the correct name on it.
12.	**Edison** will default this year to the current year.
13.	Check the box if both the criteria listed on the left are satisfied. This will prevent any taxes being deducted from your paycheck.
14.	Review the declaration. By clicking the submit button, you are declaring the information to be accurate. The submit button is similar to an electronic signature. Click the **Submit** button.  Submit

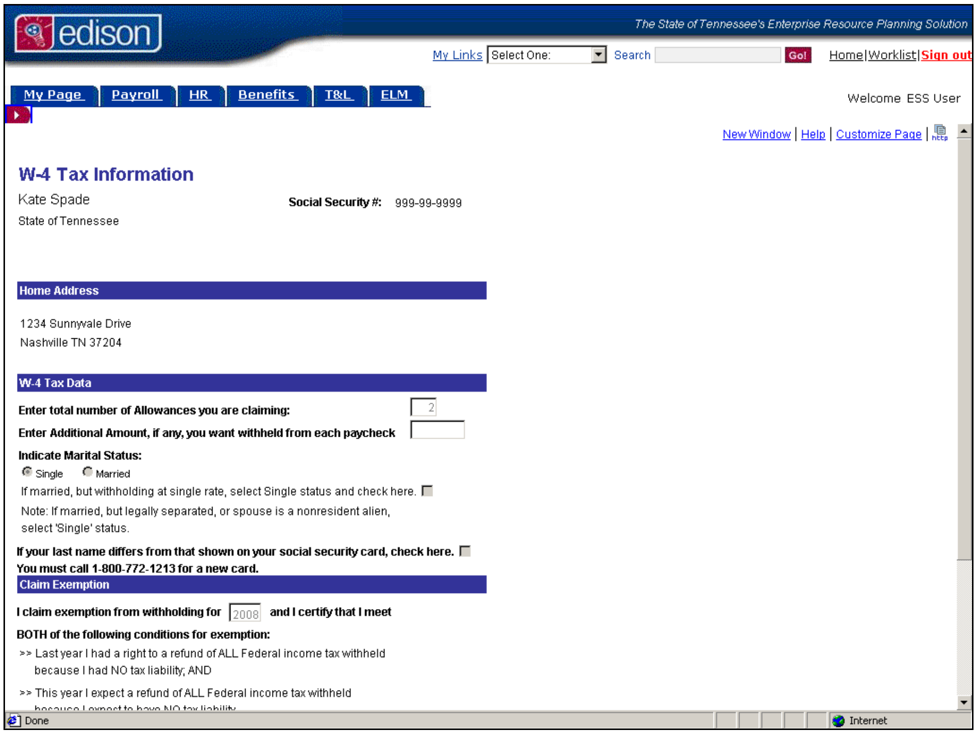


Step	Action
15.	To protect your privacy, verify your identity by typing your **Edison** password. Enter, "**Edison#2**".

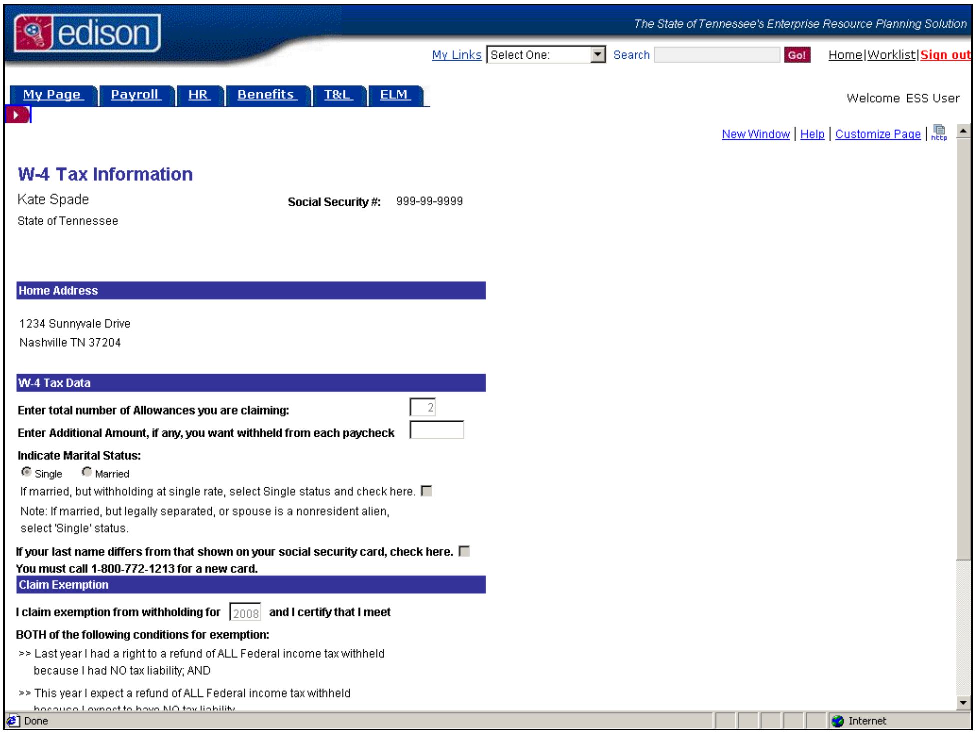
Step	Action
16.	Click the **Continue** button. Continue



Step	Action
17.	Click the **OK** button. OK



Step	Action
18.	If you have questions regarding your W-4 Tax information you recently updated, contact the **Central Payroll Call Center** at 615-741-PAID or 866-944-3873.



Step	Action
19.	You have successfully reviewed and updated the **W-4 tax** information. **End of Procedure.**

My Timesheet

Understanding the Timesheet

The **Timesheet** is used by employees to review, enter and update their time. When an employee is hired, they are assigned to a schedule in the Edison system. Schedules may vary by employee depending on their job requirements. For example, an employee is hired and assigned a work schedule of Monday thru Friday, 8:00 - 4:30.

The schedule assigned to an employee will determine the work hours that will automatically populate on their timesheet. For example, the timesheet for an employee who works Monday - Friday from 8:00 AM to 4:30 PM would automatically populate scheduled hours as follows:

Monday 7.5 hours, Tuesday 7.5 hours, Wednesday 7.5 hours, Thursday 7.5 hours, and Friday 7.5 hours.

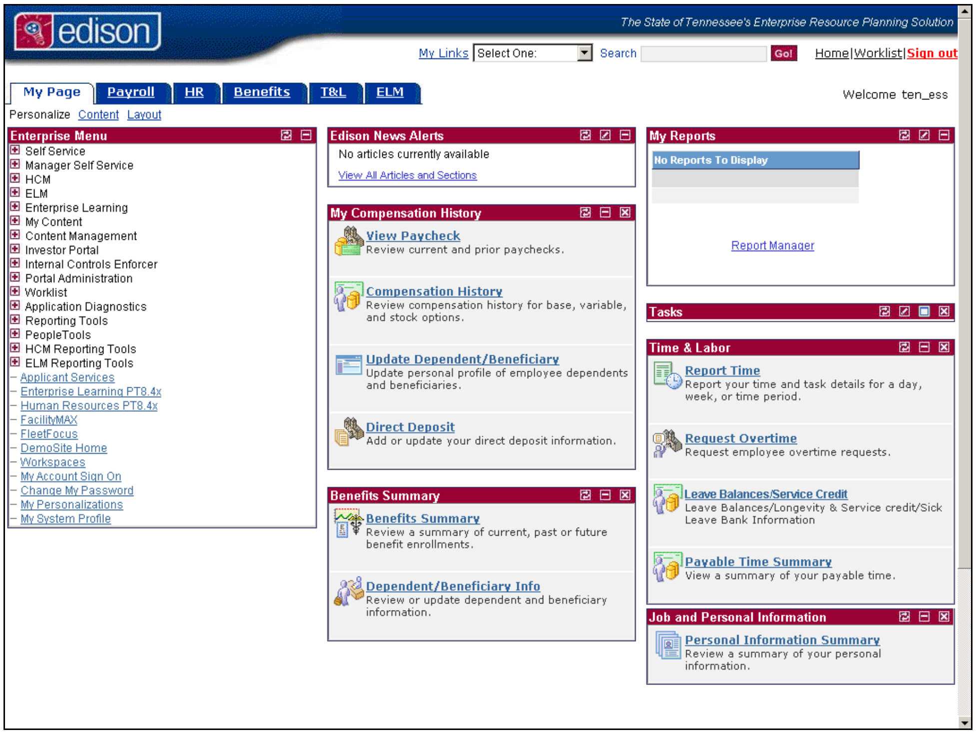
At a minimum, employees are required to review the hours pre-populated on their timesheet to ensure accuracy and assign the appropriate time reporting code for those hours. Employees are also required to update their time when changes are needed, including: sick leave, annual leave, holiday, etc. You will learn more about each procedure as you continue through this course.

All time is submitted for supervisor/manager approval before being processed through payroll.

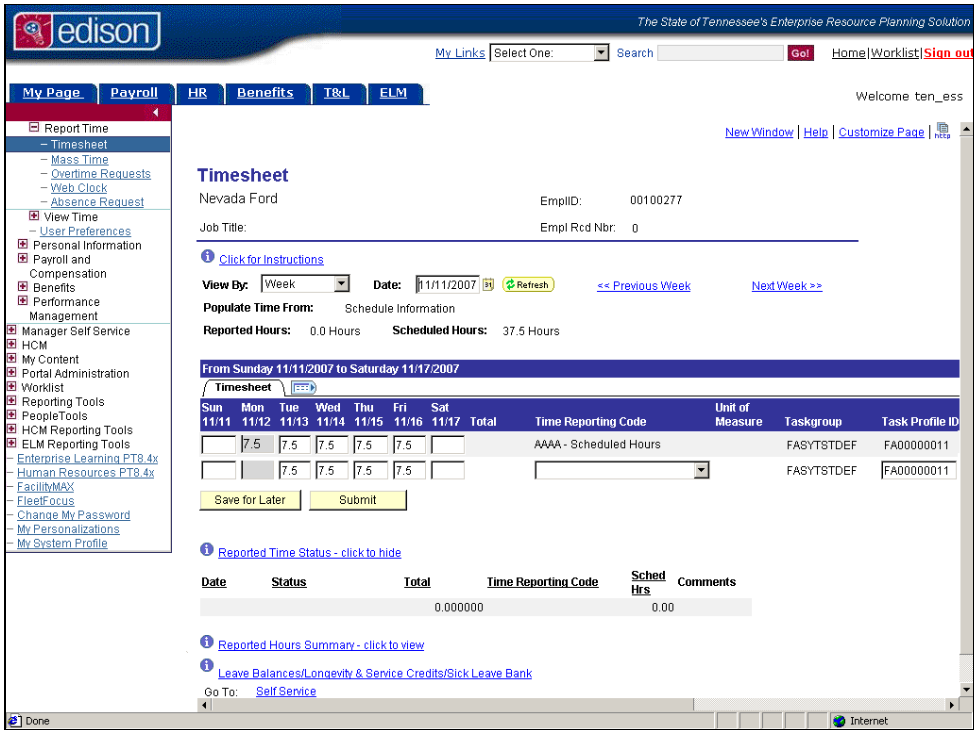
Procedure

This lesson provides an explanation of the fields located on the timesheet. The intent is to familiarize you with the fields, and provide more details about how each field will be used in later scripts.

Step	Action
1.	**My Page** is the first page you will see after logging into Edison. From this page, you will navigate to the different areas within Edison depending on your job duties and system-assigned security.

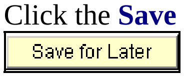


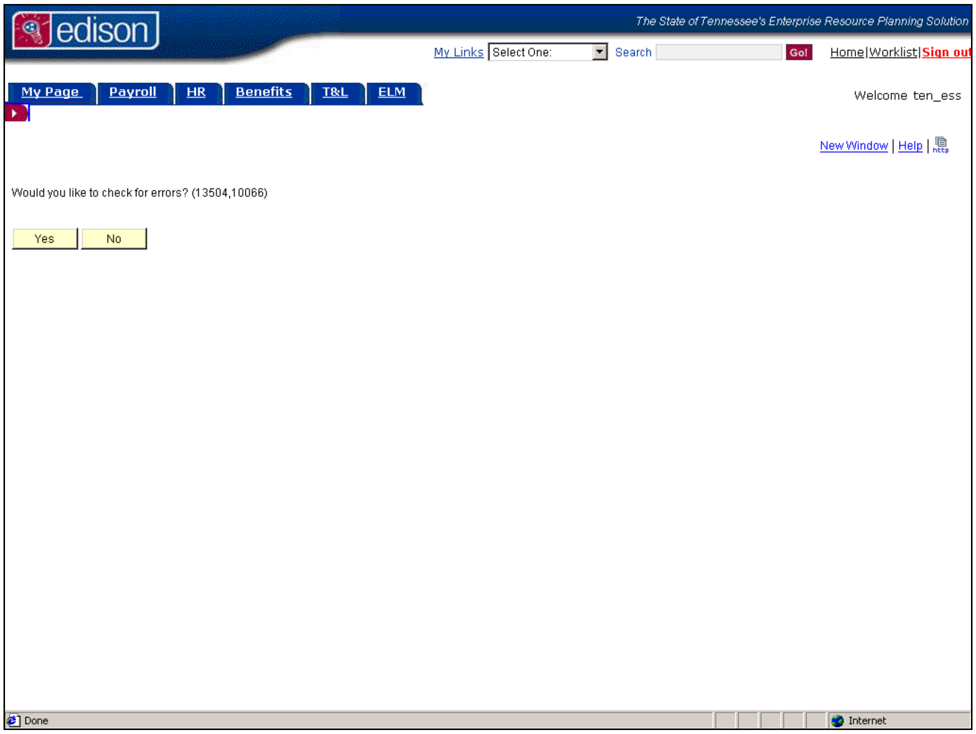
Step	Action
2.	Click the **Report Time** link. Report Time

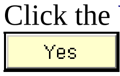
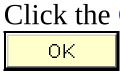


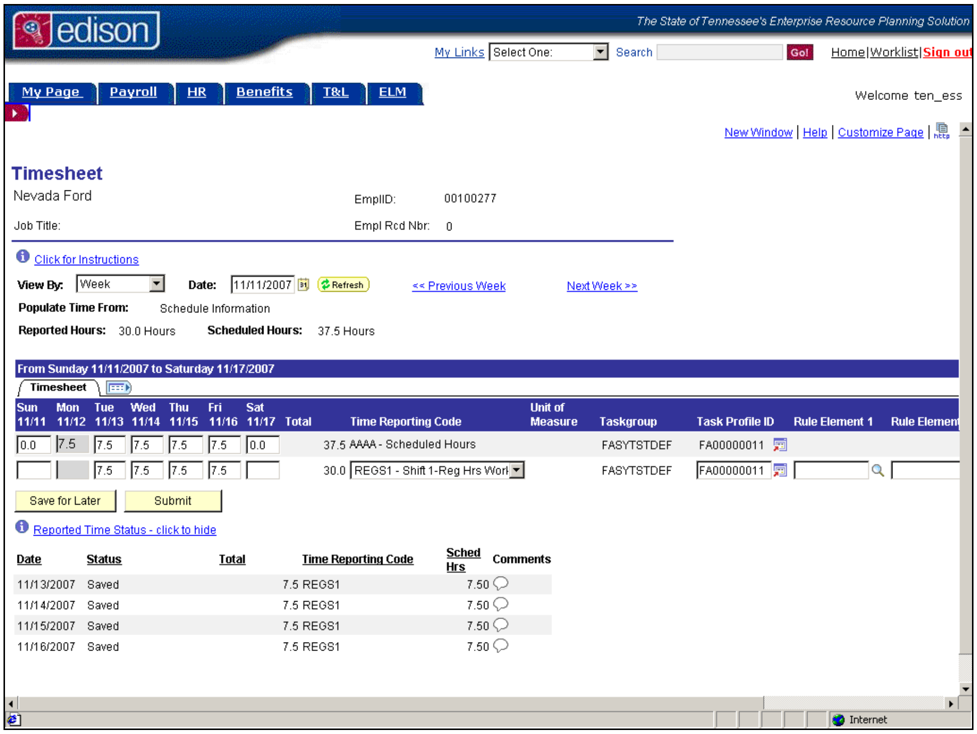
Step	Action
3.	To provide more room on the page, click the **Collapse** button.
4.	The top of the page displays the **Employee's Name, EmplID, Job Title,** and **Empl Rcd Nbr**.
5.	The **View By** selection allows the employee to view time according to different time options. The option currently displayed is "Week." Notice how one week of time is displayed on the page.
6.	Click the **View By** list to view other available options.
7.	The **View By** list contains three options: **Day**, **Time Period** and **Week.** It is recommended that employees using Edison enter their time on a weekly basis, therefore the view by **Week** option will be used in this lesson. **Note:** The option "**Week**" will be assumed by the Edison system.
8.	Click the **Week** list item. Week
9.	The date displayed is the first day of the employee's work week.
10.	If the date is changed, use the **Refresh** button to update the page.
11.	To view additional weeks, use the **Previous Week** and **Next Week** links to navigate to the respective timesheets.

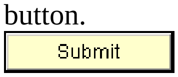
Step	Action
12.	Notice the dates in the title bar of the timesheet indicate the beginning and ending dates of the week displayed on the timesheet.
13.	The first row on the timesheet is the scheduled hours row denoted with the **AAAA-Scheduled Hours TRC**. You are able to change the hours for the corresponding days, but you cannot change the **TRC**, **Taskgroup**, or **Task Profile ID**. The default **Taskgroup** and **Task Profile ID** will automatically appear on the scheduled hours row.
14.	If you are a regular full-time employee, the system will require that the scheduled hours row equal your standard hours (i.e. 37.5 or 40.0).
15.	Notice how the assigned schedule automatically populated on the second row when the timesheet was opened. This is where an employee would change any incorrect hours, add any additional hours if worked, or update hours for leave. These items will be discussed in greater detail as you continue through this course.
16.	The gray shaded area indicates the day is recognized as a State holiday, in this case, Veteran's Day. Please refer to the "Holiday Reporting" lesson for more details.
17.	The next item on the timesheet is the **Time Reporting Code** (TRC). TRCs assign an employee's time to a specific type of time (worked or non-worked), including: regular time worked, sick leave, annual leave, etc.
18.	View the Time Reporting Codes (**TRC**) for Regular and Annual Leave Time.
19.	To select a TRC, simply click the **Time Reporting Code** list.
20.	Use the scrollbar to find the appropriate TRC, or search for the appropriate TRC by entering the first letter of the TRC. In this example, the TRC "**REGS1-Shift1-Reg Hrs Worked**" will be used, therefore you enter the letter "**r**" into the **Time Reporting Code** field.
21.	Click the **REGS1 - Shift 1-Reg Hrs Worked** list item. REGS1 - Shift 1-Reg Hrs Work
22.	Each employee is assigned to a single **Taskgroup. Taskgroup** values automatically populate on the employee's timesheet. **Note:** Taskgroup values can only be changed by an agency's HR Office.

Step	Action
23.	The **Task Profile ID** field is used by agencies allocating labor distribution costs to grants, projects, etc. A special search page has been designed to assist agencies in searching for the correct **Task Profile ID**. This page is accessed by clicking on the search page icon next to the Task Profile ID field. **Note:** Agencies who are not using labor distribution will use the automatically populated values. Selecting the appropriate **Task Profile ID** on the timesheet is very important. There are many **Task Profile IDs** available for employees to select from; therefore it is important that each employee is careful when selecting the appropriate **Task Profile ID**. **Task Profile ID** definitions are discussed in the lesson “Projects/Grants Labor Distribution Fields.”
24.	Click the scrollbar.
25.	The **Rule Element 1** field is used to determine how overtime compensation will be paid. This field is used on a limited basis and only in specific situations by some agencies to determine if overtime will be compensated by paying cash or by generating comp time. Refer to the "Changing Overtime Compensation Methods" lesson for more details on Rule Elements.
26.	Click the scrollbar.
27.	The **Save for Later** button allows the user to save reported time without submitting it to their supervisor for approval. The saved data will remain in a holding status until it is submitted by the employee. For example, when an employee submits their time on a weekly basis, they can enter their time each day on the timesheet and click the **Save for Later** button. This will cause the system to save their information, but not submit it for processing and approval. At the end of the week and the end of the pay period, the employee **must** submit the timesheet for processing and supervisor approval by selecting the **Submit** button. The **Save for Later** button will prompt the user to select whether or not they would like to check for errors on the timesheet. **Note:** Not all errors are detected using this process.
28.	Click the **Save for Later** button. 
29.	If you would like to check for online errors, select **Yes**. Online errors refer to rules that are applied immediately to the time you entered. Only a few rules will be applied at this time, but all rules will be applied when the timesheet is submitted and Time Administration runs.

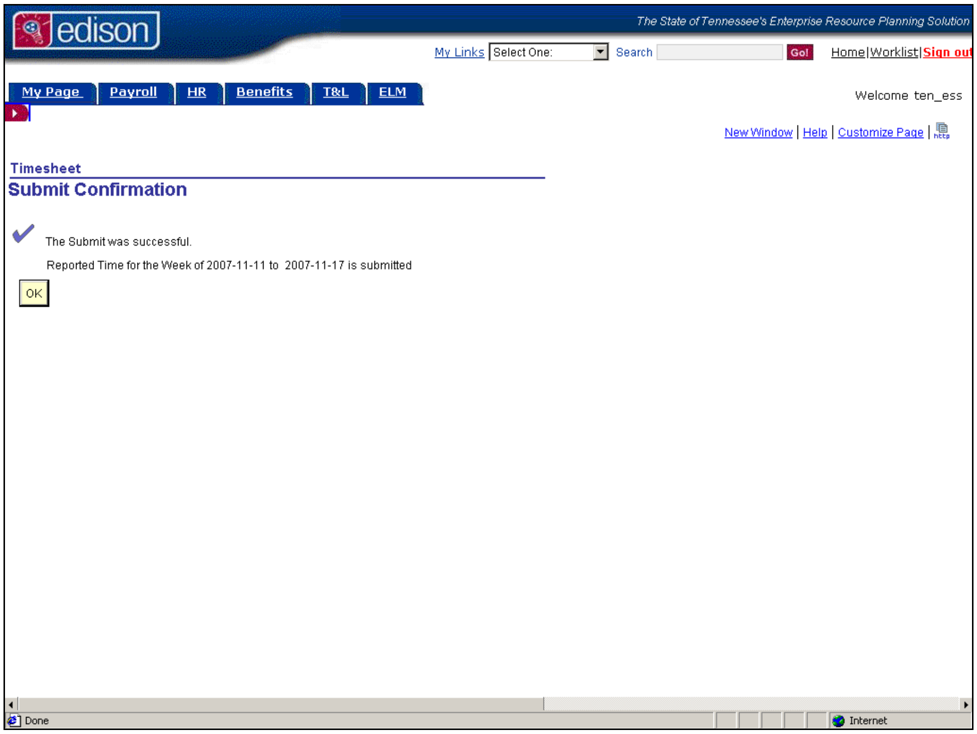


Step	Action
30.	Click the **Yes** button. 
31.	Click the **OK** button. 
32.	Notice the **Reported Time Status** is **Saved.**



Step	Action
33.	When time entry has been completed for the week and/or pay period, click the **Submit** button. 
34.	Occasionally the system will issue a warning message. These messages are designed to assist the employee by avoiding possible errors on their timesheet. In this example, the system recognizes November 12, 2007 as a holiday (Veteran's Day). Please refer to the "Holiday Reporting" lesson for more details, so for now, we are going to click the **OK** button to continue submitting the timesheet.

Step	Action
35.	Click the **OK** button. OK



Step	Action
36.	Click the **OK** button. 
37.	Now the **Reported Time Status** is **Submitted**.
38.	This is the standard timesheet that will be used by most State of Tennessee employees. Fields appearing on the timesheet may vary according to agency requirements. **End of Procedure.**

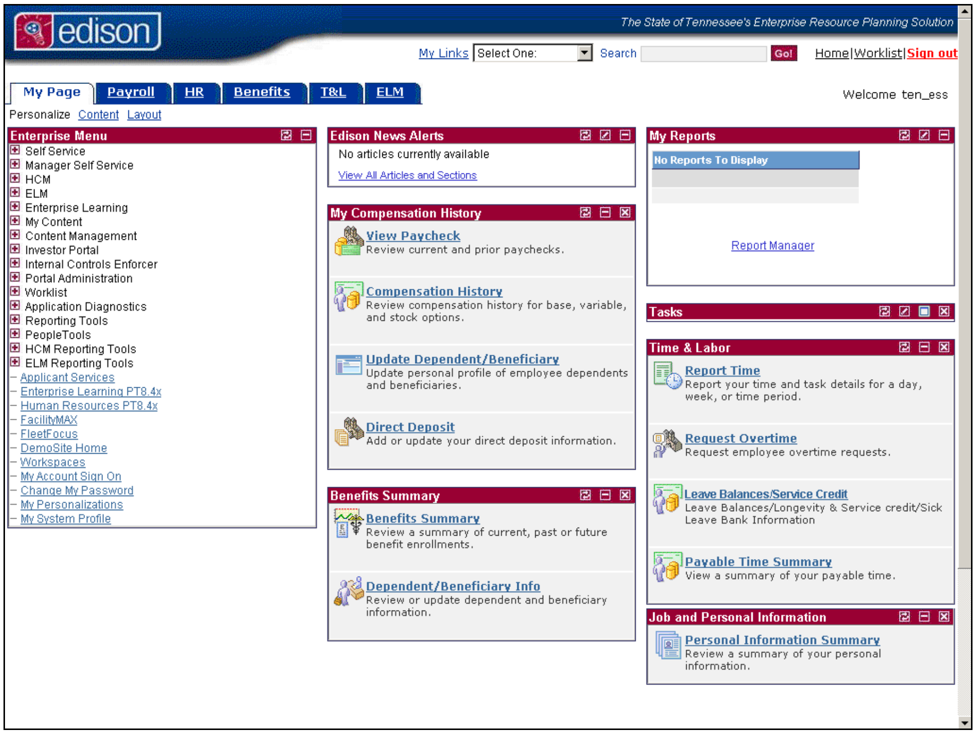
Reporting Your Time - Basics

As an employee, you will have the ability to enter your time in Edison using Employee Self Service. Based on your agency's decision, you may not be using this functionality.

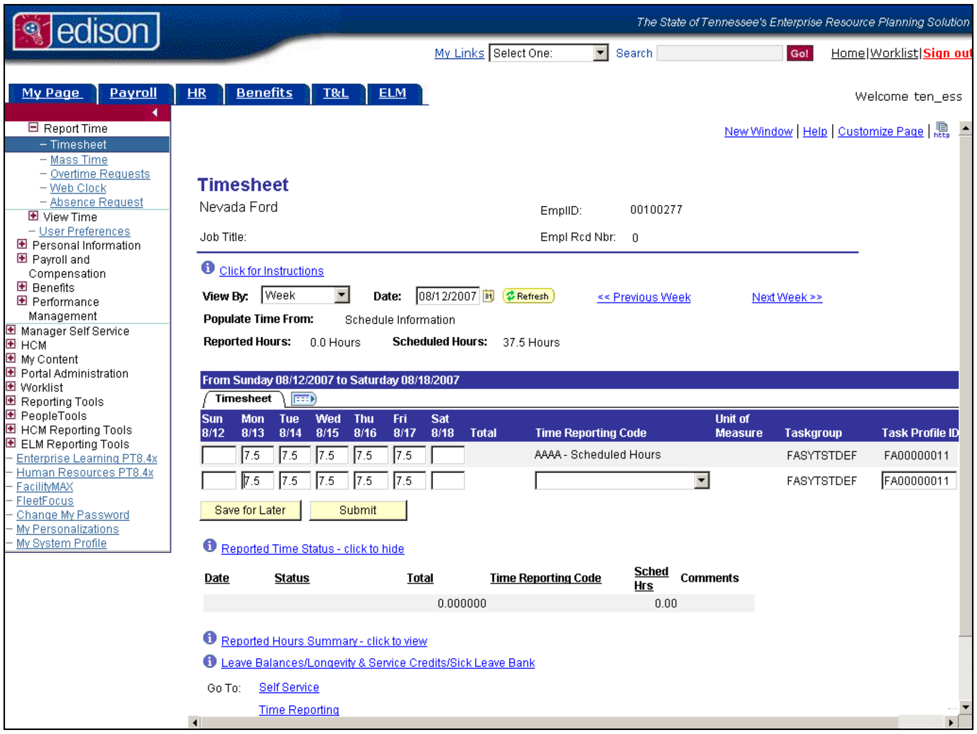
This lesson will show you the basic steps needed to understand submitting a typical timesheet within Edison. Submitting your timesheet can be a very simple process depending on your specific time reporting needs. First we'll take a look at the basics, then we will cover more complex timekeeping situations in later lessons.

Procedure

We will begin this lesson by navigating to the timesheet. This example illustrates an employee's time worked. This employee worked 7.5 hours a day, Monday through Friday for the week of August 13th through August 17th.

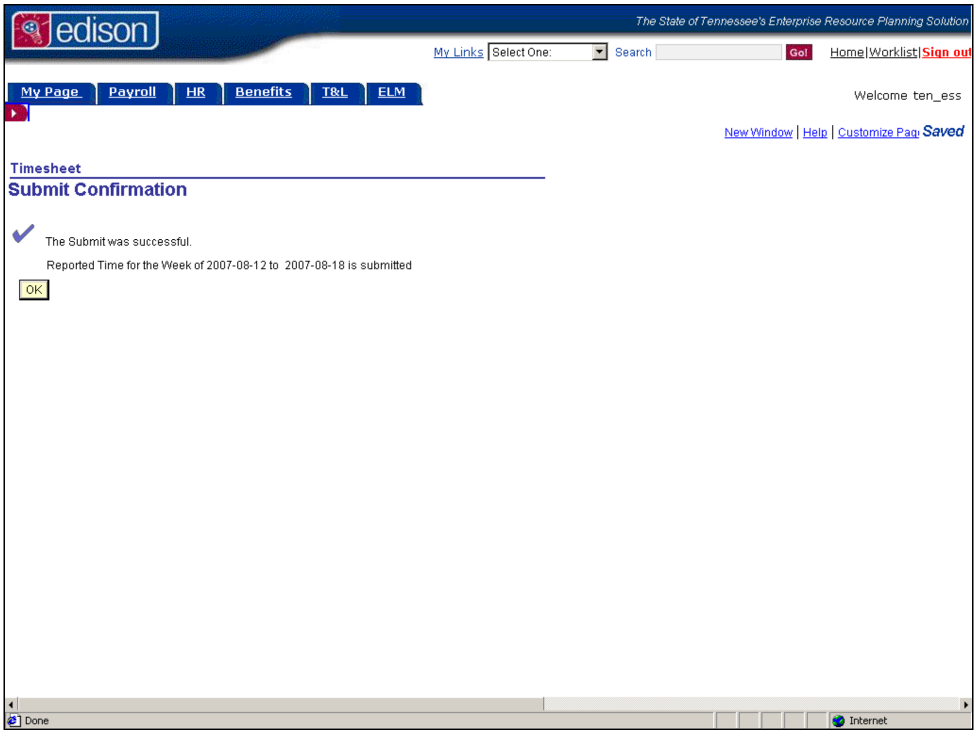


Step	Action
1.	Click the **Report Time** link. Report Time



Step	Action
2.	To provide more space on the page, click the **Collapse** button. 
3.	Notice that for a full-time employee, the assigned scheduled hours automatically generated on the timesheet and defaulted to the current week. Part-time employees will not have a schedule row or hours pre-populated on the timesheet.
4.	Review the time that automatically populated on the timesheet for accuracy. If you do not have any changes to make to your timesheet (i.e. leave or overtime), leave the time as displayed. Next, we will assign a **Time Reporting Code**.
5.	If time was previously submitted for a prior pay period (due to a split work week), leave the reported time as is for the previous pay period **- do not** clear out the time.
6.	Assign the appropriate **Time Reporting Code (TRC)** to the reported time. Some employees may recognize these as hour types. Click the **Time Reporting Code** drop down list. 

Step	Action
7.	The TRC list contains many TRCs. As discussed earlier in this course, selecting the appropriate TRC is very important. Not all TRCs are used by the employee. The following four TRCs are the most commonly used: **TRC Description** REGS1 -- Shift 1-Reg Hrs Worked AL ------- Annual Leave SL ------- Sick Leave CL ------- Compensatory Leave
8.	Depending on your agency's Time and Labor reporting needs you may have additional **Time Reporting Codes** (TRC) that you will be required to select. Examples of other available TRC values are: **TRC Description** ADMEL --- Adm Election Leave ADMHS -- Adm Health Services Leave ADMIV --- Adm State Exam/Interview Leave BER ------ Bereavement Leave CIV ------ Civil Leave LWOP --- Current without Pay REGS2 --- Shift2-Reg Hrs Worked REGS3 --- Shift3-Reg Hrs Worked REGTR --- Training Time Worked If at any time you are uncertain regarding which TRC is the correct one to select, check with your supervisor or agency Timekeeper. Selecting an incorrect TRC could generate an error when the system processes your timesheet.
9.	Since the employee worked all of her regularly scheduled hours, we will assign the TRC for **Regular Hours Worked (REGS1)**.
10.	Click the scrollbar.
11.	Click the **REGS1 - Shift 1-Reg Hrs Worked** list item. REGS1 - Shift 1-Reg Hrs Work
12.	Each employee is assigned to a single **Taskgroup** and **Task Profile ID**. These values automatically default on the employee's timesheet.
13.	Click the **Submit** button. Submit



Step	Action
14.	Click the **OK** button to return to the timesheet. OK
15.	Notice that the reported time is in a status of **Submitted**.
16.	You have successfully completed a timesheet that did not require any time changes. In following lessons you will learn how to report holiday, overtime, and absences on your timesheet. **End of Procedure.**

Manual Rescheduling

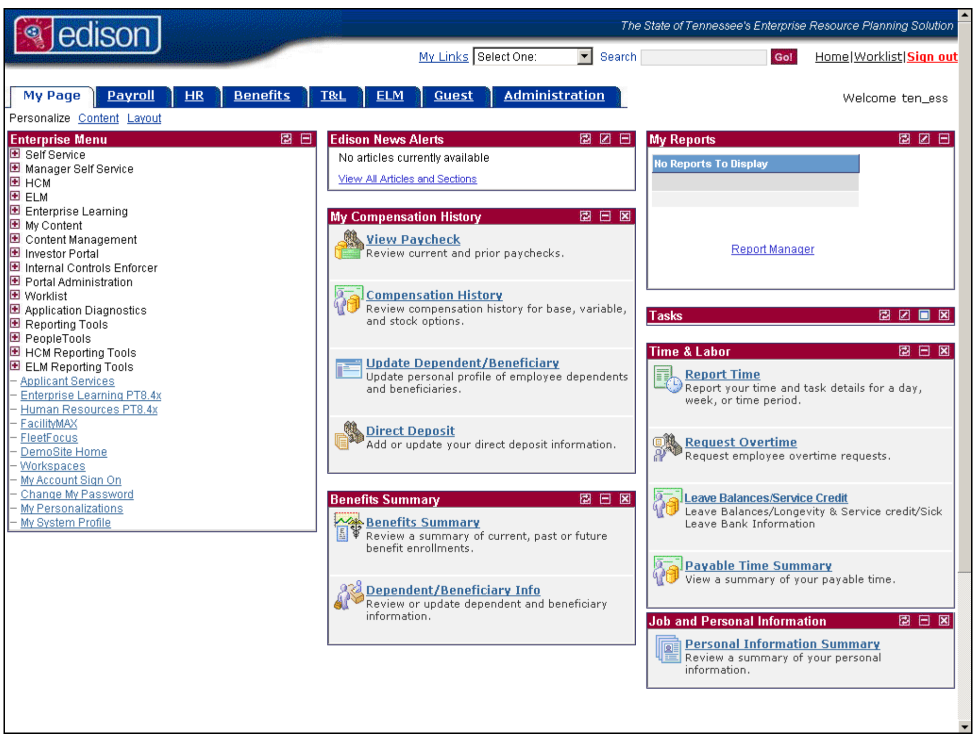
In Edison, functionality is available to manually reschedule your workweek. A few things to keep in mind before changing your scheduled hours:

1. The hours on the schedule row need to equal your standard hours (i.e. 37.5).
2. Manually rescheduling during a holiday week could impact holiday eligibility and compensation. Please consult your TL Administrator prior to rescheduling during a holiday week.
3. An overtime request will still be required if time is worked in excess of rescheduled hours.
4. The schedule is only changed for the current time period and will revert back to the standard schedule the following time period. If permanent changes need to be made, you will need to contact the TL Administrator.

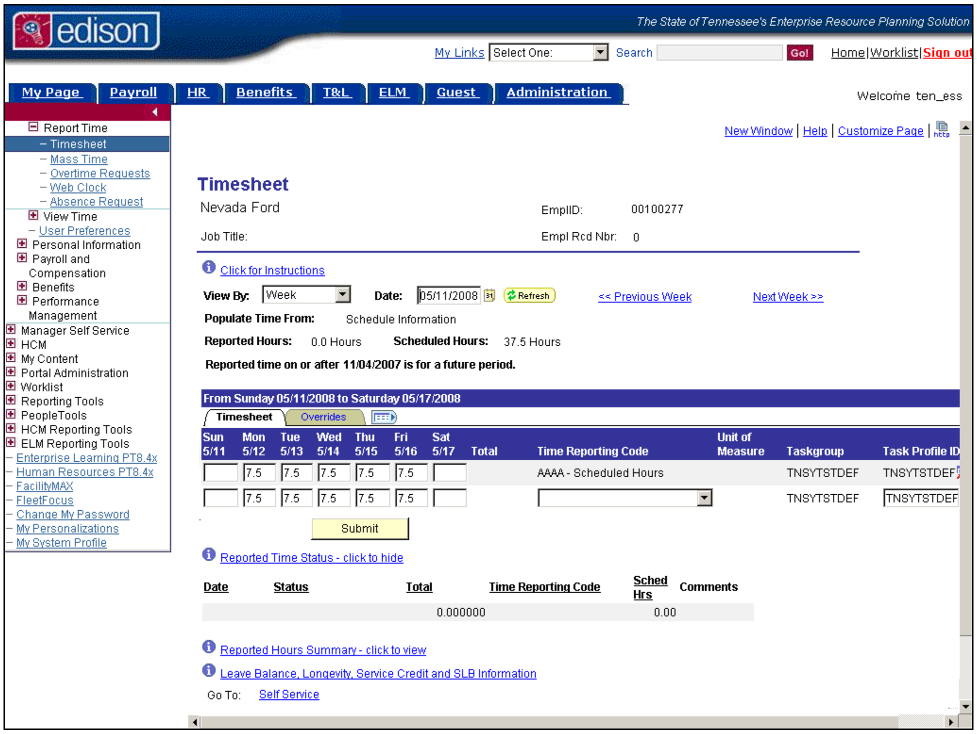
Procedure

In this lesson, we will demonstrate how to manually reschedule the workweek.

Step	Action
1.	In Edison, functionality is available to manually reschedule your workweek. A few things to keep in mind before changing your scheduled hours: 1. The hours on the schedule row need to equal your standard hours (i.e. 37.5). 2. Manually rescheduling during a holiday week could impact holiday eligibility and compensation. Please consult your TL Administrator prior to rescheduling during a holiday week. 3. An overtime request will still be required if time is worked in excess of rescheduled hours. 4. The schedule is only changed for the current time period and will revert back to the standard schedule the following time period. If permanent changes need to be made, you will need to contact the TL Administrator.

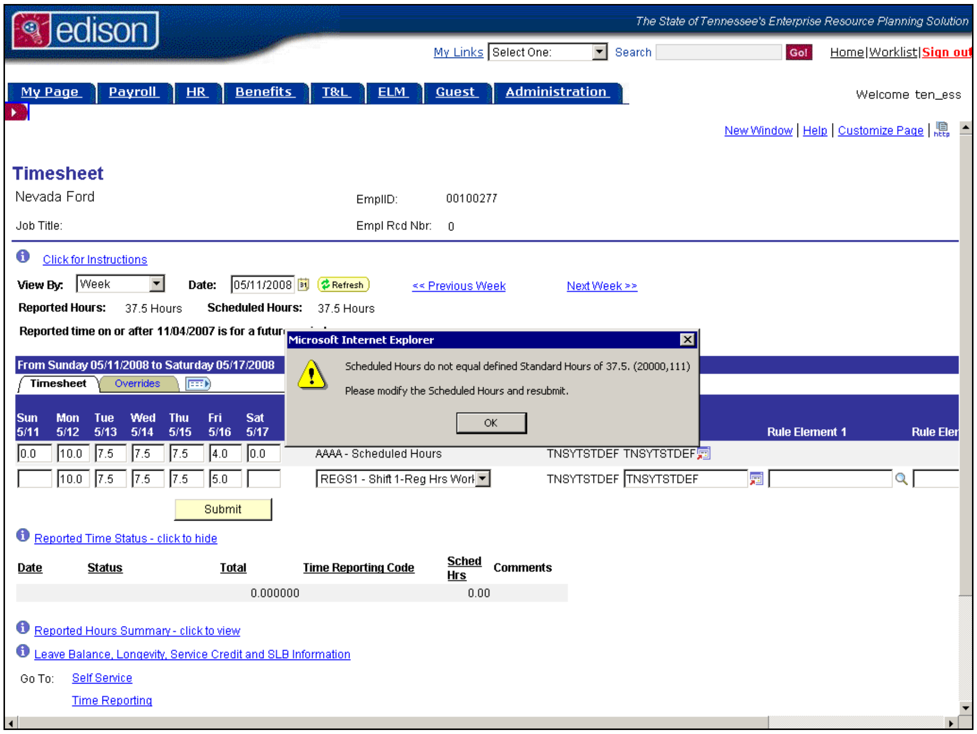


Step	Action
2.	Click the **Report Time** link. Report Time

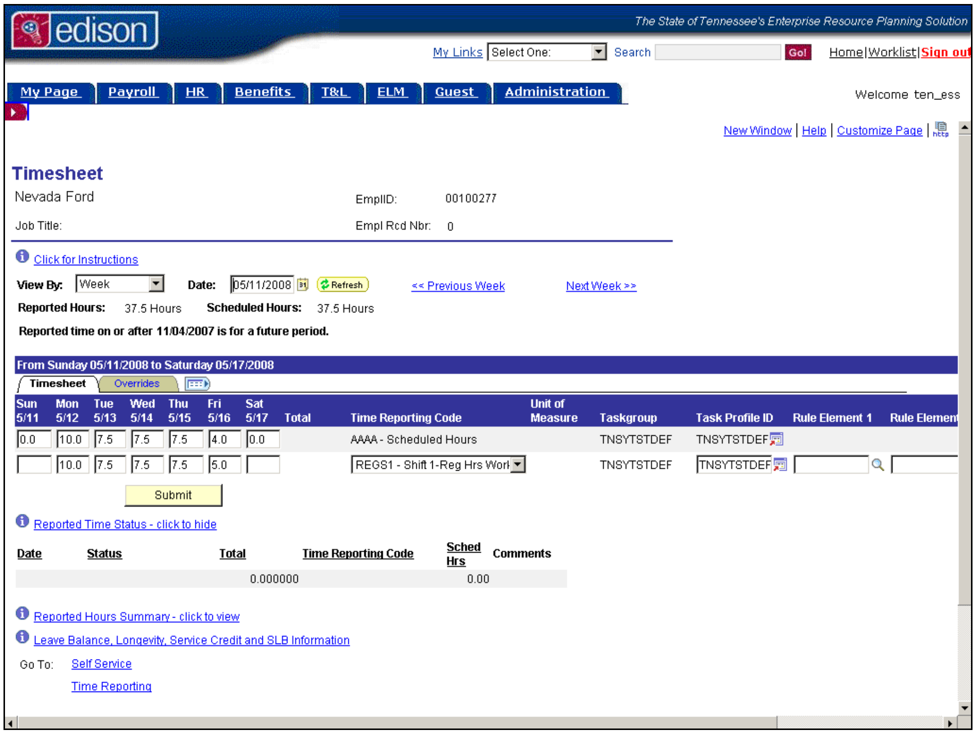


Step	Action
3.	Click the **Collapse** button. 
4.	The first row on the timesheet is the scheduled hours row denoted with the **AAAA-Scheduled Hours TRC**. You are able to change the hours for the corresponding days, but you cannot change the **TRC**, **Taskgroup**, or **Task Profile ID**. The default **Taskgroup** and **Task Profile ID** will automatically appear on the scheduled hours row.
5.	The employee reschedules his time to reflect the following: Monday - 10 hours Tuesday - Thursday - 7.5 hours/day Friday - 5 hours However, we are going to "accidentally" mistype the scheduled hours on Friday and only enter 4.0 hours to show the warning message for the online validation of the number of scheduled hours. Remember, the number of scheduled hours needs to add up to the standard hours per week (i.e. 37.5).

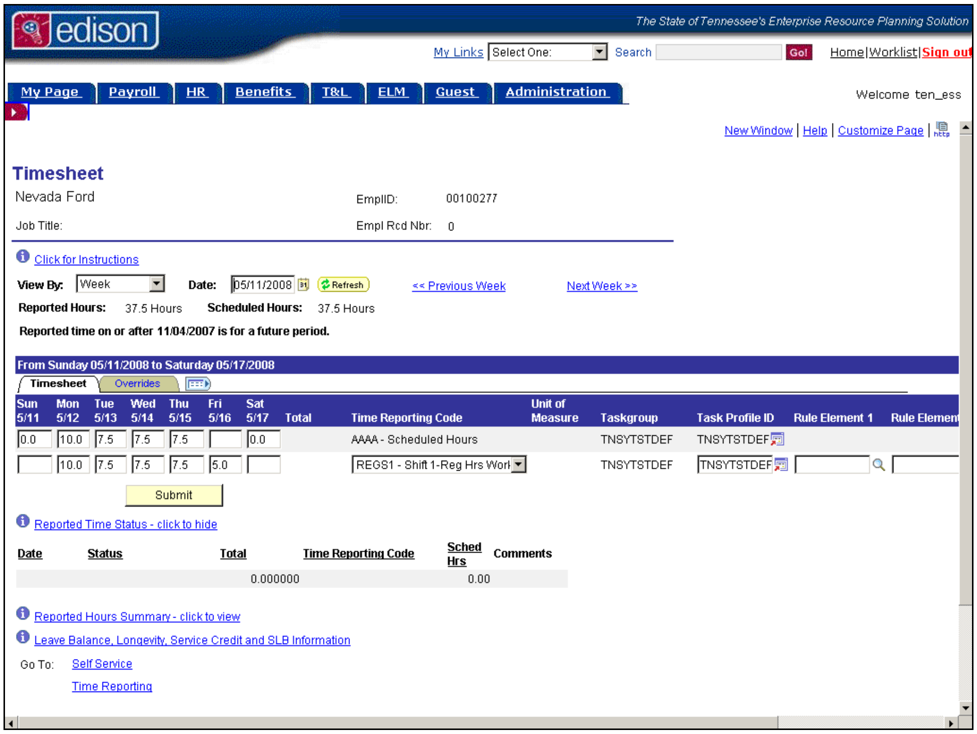
Step	Action
6.	Click in the **Mon 5/12** field on the scheduled hours row. 7.5
7.	Press **[Backspace]** to delete the hours scheduled for the day.
8.	Enter the desired information into the **Mon 5/12** field. Enter "**10**".
9.	Click in the **Fri 5/16** field on the scheduled hours row. 7.5
10.	Press **[Backspace]** to delete the hours scheduled for the day.
11.	Enter the desired information into the **Fri 5/16** field. Enter "**4.0**".
12.	Next, we need to modify the reported time row to reflect the changes made to the schedule.
13.	Click in the **Mon 5/12** field. 7.5
14.	Press **[Backspace]** to delete the hours reported for the day.
15.	Enter the desired information into the **Mon 5/12** field. Enter "**10**".
16.	Click in the **Fri 5/16** field. 7.5
17.	Press **[Backspace]** to delete the hours reported for the day.
18.	Enter the desired information into the **Fri 5/16** field. Enter "**5.0**".
19.	Click the **Time Reporting Code** list.
20.	Find the desired information from the **Time Reporting Code** list. To quickly navigate to a letter of the alphabet, enter that letter. To navigate to REGS1 (Regular Hours Worked - 1st Shift), enter "**r**."
21.	Click the **REGS1 - Shift 1-Reg Hrs Worked** list item. REGS1 - Shift 1-Reg Hrs Work
22.	Click the **Submit** button. Submit
23.	A warning message appears indicating the modified scheduled hours row does not equal the number of standard hours, so we need to go back to the timesheet to make more changes.



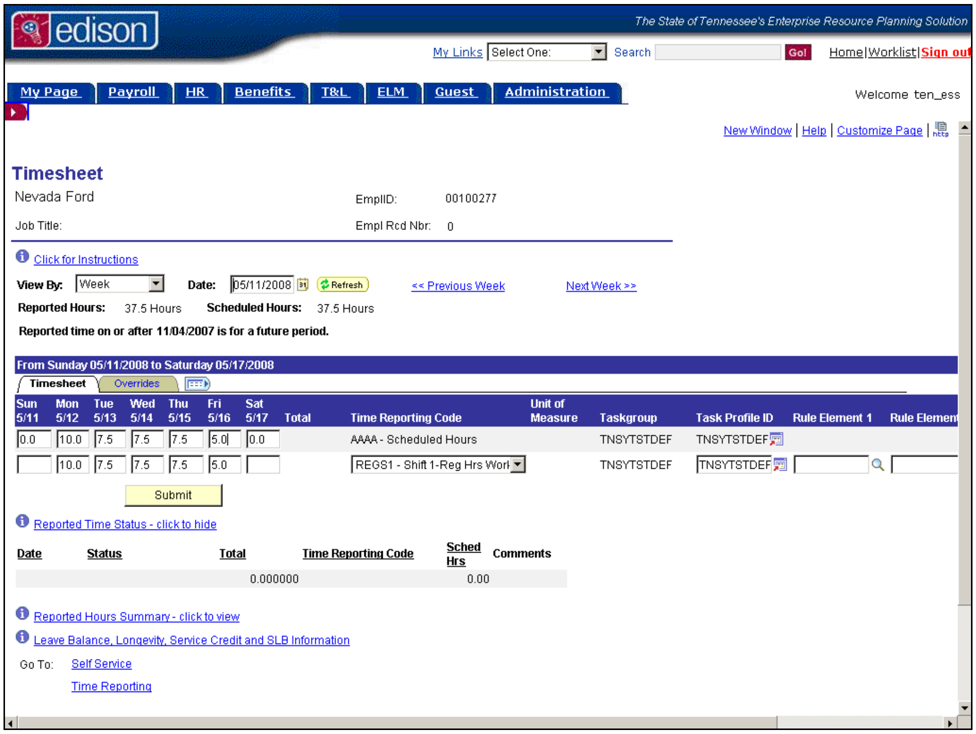
Step	Action
24.	Click the **OK** button.



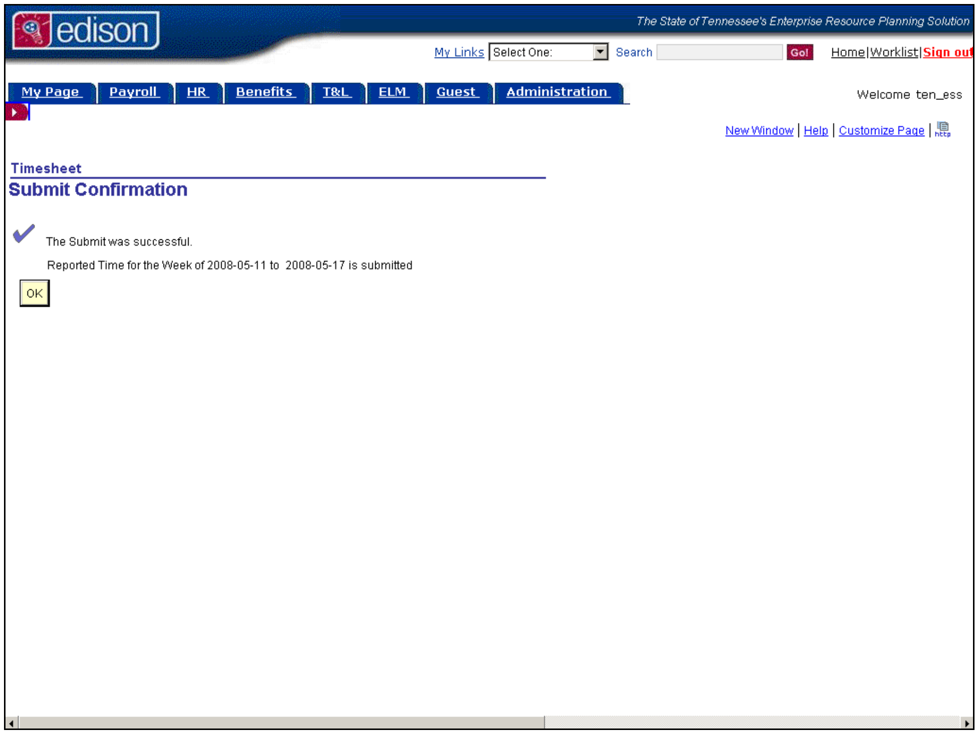
Step	Action
25.	Click in the **Fri 5/16** field on the scheduled hours row. 4.0
26.	Press **[Backspace]** to delete the scheduled hours for the day.



Step	Action
27.	Enter the desired information into the **Fri 5/16** field. Enter "**5.0**".



Step	Action
28.	Click the **Submit** button. Submit



Step	Action
29.	Click the **OK** button. 
30.	Notice, the **Scheduled Hours** column reflects the number of hours entered on the scheduled hours row.
31.	You have successfully manually rescheduled a work week. **End of Procedure.**

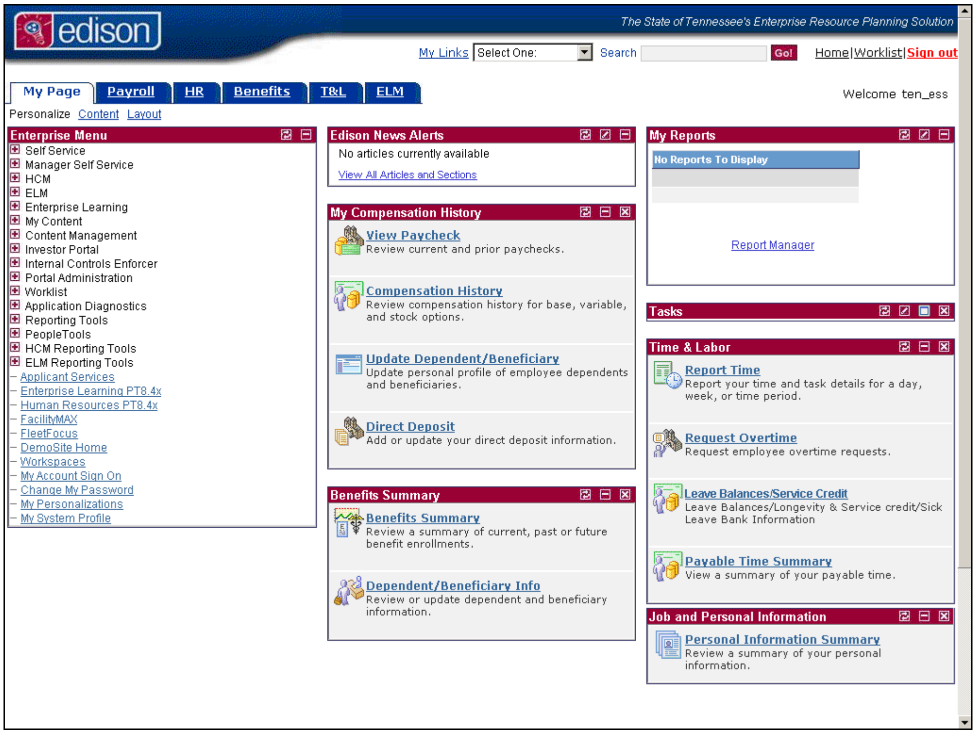
Reporting Leave on Your Timesheet

Previously, you learned how to submit a timesheet in which the employee worked their regularly scheduled hours. In this lesson, we will demonstrate how to record annual leave on the timesheet.

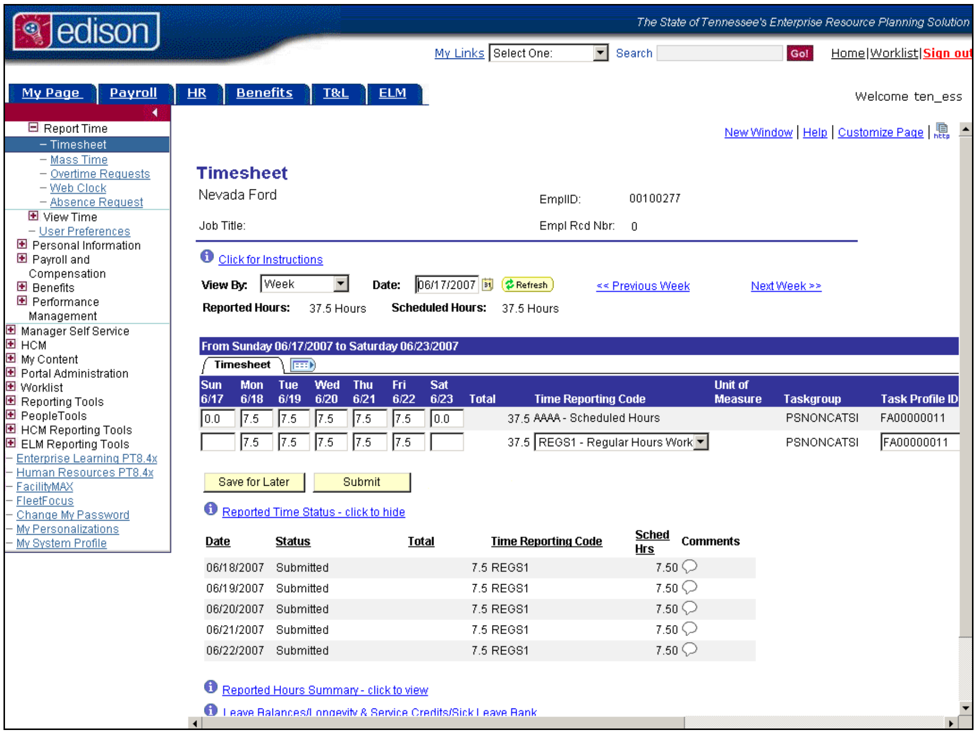
For example, if an employee took a day of annual leave on a regularly scheduled workday, it would be necessary to delete the 7.5 scheduled hours that appear on the timesheet and enter 7.5 hours of annual leave on a separate line with the appropriate **Time Reporting Code**.

Procedure

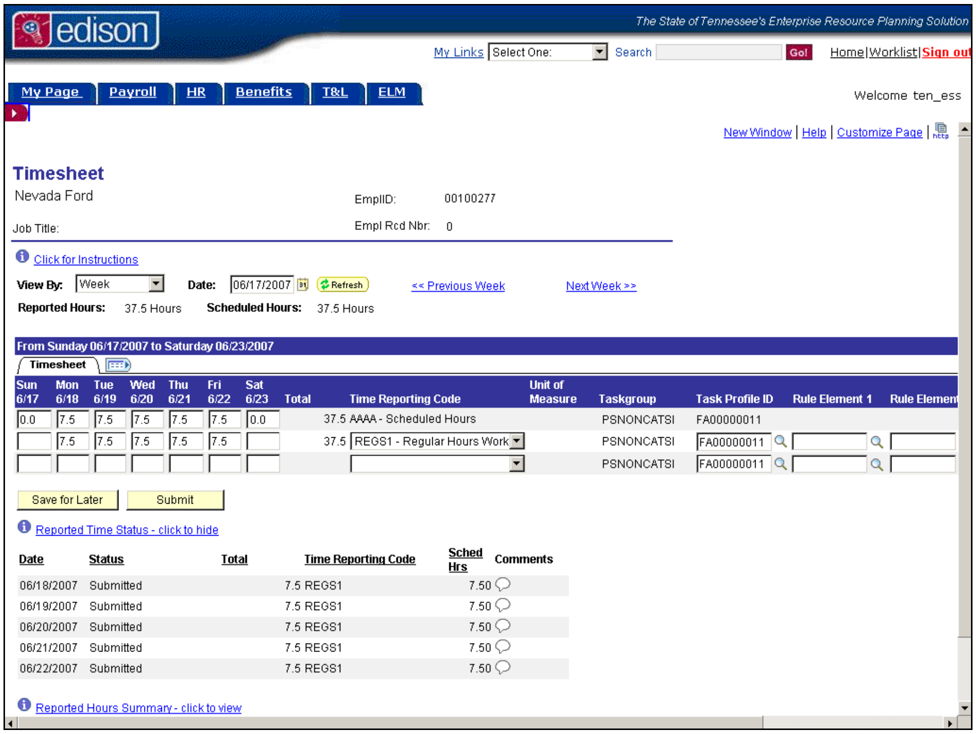
In this lesson, we will be entering leave taken on the timesheet. Even though the timesheet has already been submitted, we can still report leave on the timesheet within the same pay period. Do not make adjustments to prior pay periods. The steps involved are virtually the same regardless of whether this time is being entered initially or being corrected.



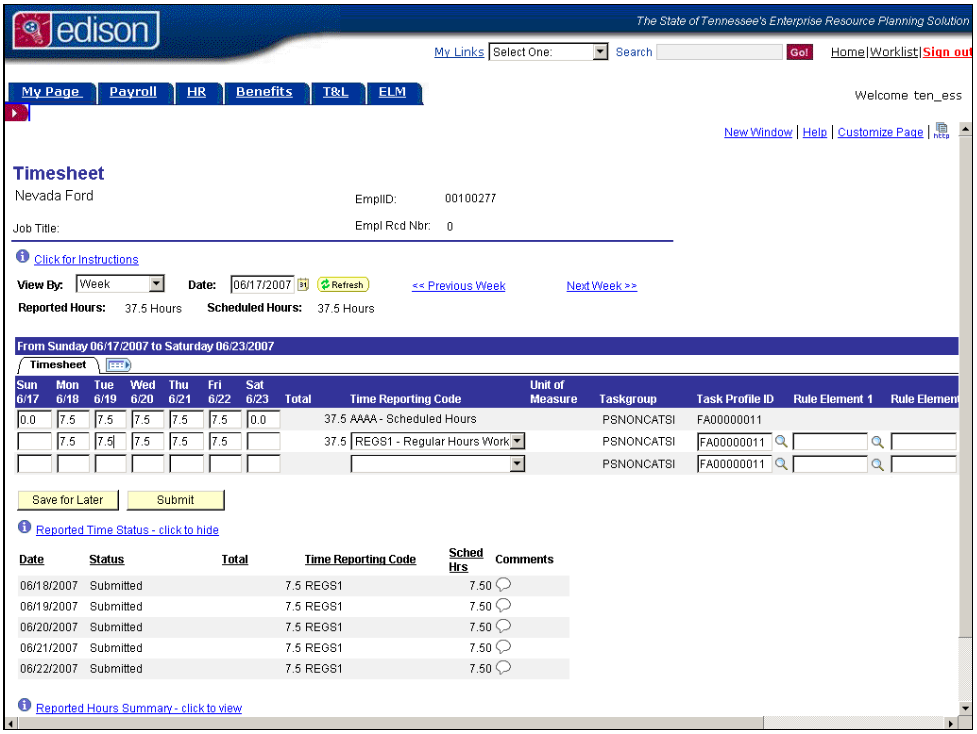
Step	Action
1.	Click the **Report Time** link. Report Time



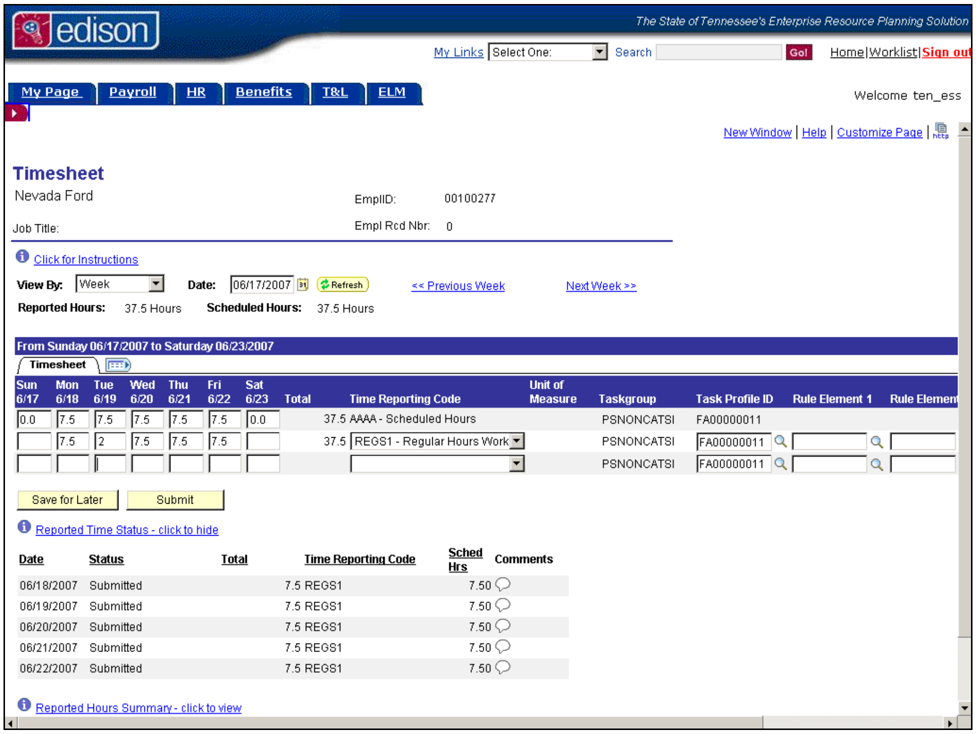
Step	Action
2.	To provide more room on the page, click the **Collapse** button. 
3.	In this example, the timesheet for this week has already been submitted. However, we realized after submitting the timesheet that leave should have been entered. Since this correction is in the current pay period, we simply open the timesheet back up, as we have done now, make the corrected entries, and resubmit the time. Contact your agency TL Administrator if changes need to be made to prior pay periods.
4.	Each row on the timesheet is associated with one **Time Reporting Code** (TRC), so additional rows need to be added for each TRC. We need to add a new row to reflect the annual leave taken on Tuesday, 6/19.
5.	Click the scrollbar.
6.	Click the **Add a new row** button. 
7.	In this example, the employee worked 2 regular hours and used 5.5 hours of annual leave on Tuesday, 6/19.
8.	First, we need to delete the number of regular hours worked on Tuesday.



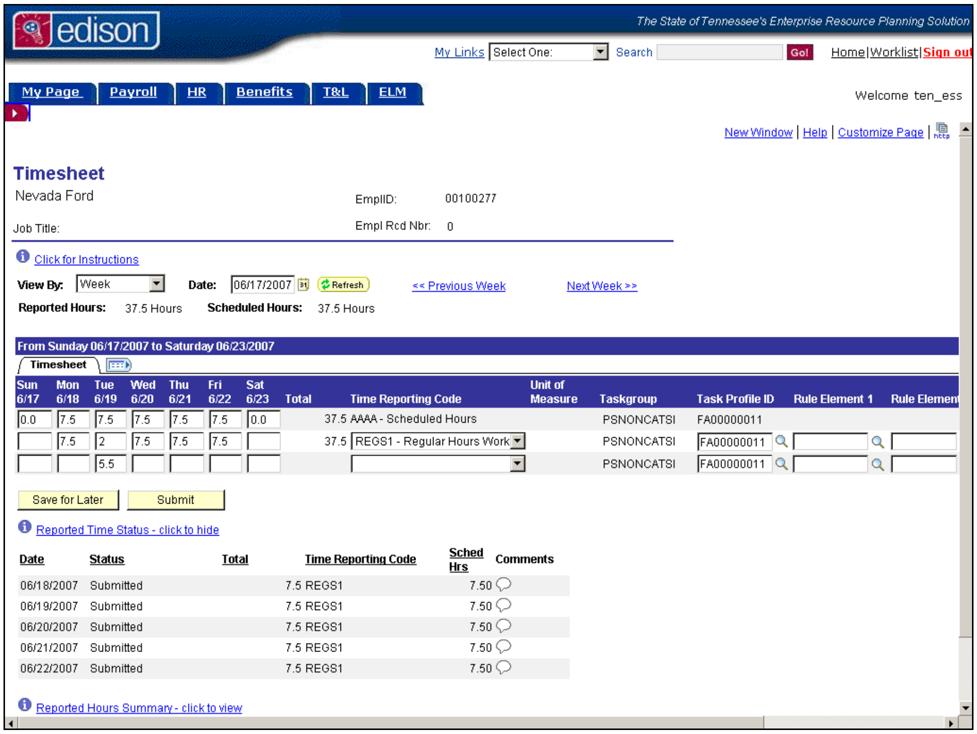
Step	Action
9.	Click in the **Tues 6/19** field. 7.5

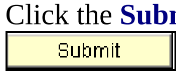


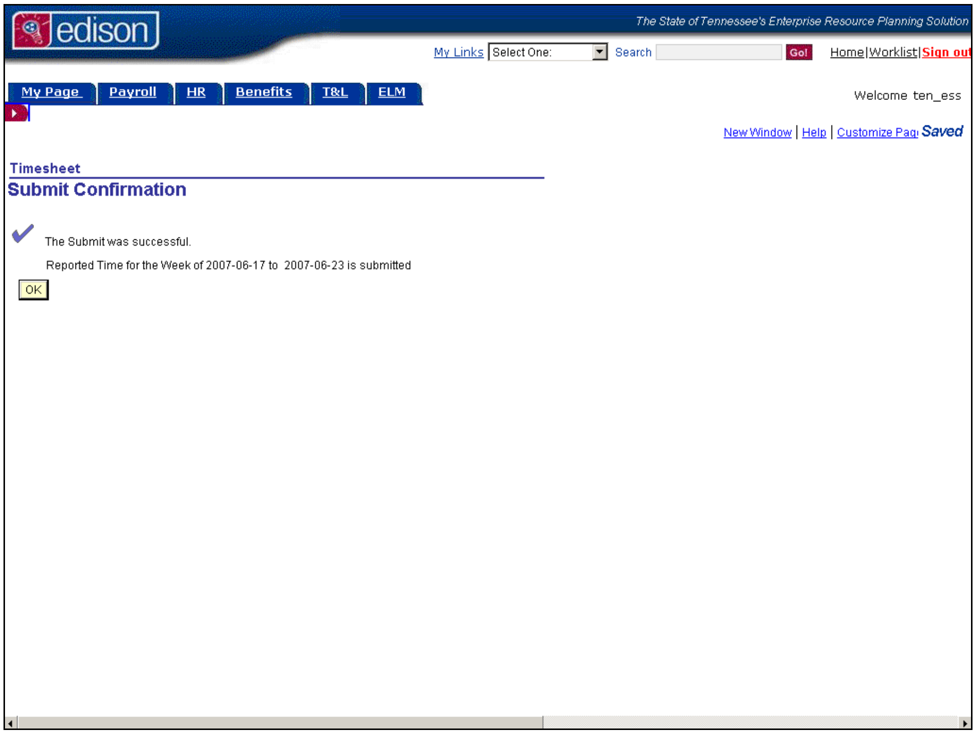
Step	Action
10.	Press **[Backspace]**.
11.	Enter the desired information into the **Tues 6/19** original row. Enter "**2**".
12.	On the new row, click in the **Tue 6/19** field.



Step	Action
13.	Enter the desired information into the **Tue 6/19** field on the new row. Enter "**5.5**".



Step	Action
14.	Click the **Time Reporting Code** list. 
15.	Click the **Annual Leave** list item. 
16.	Click the **Submit** button. 



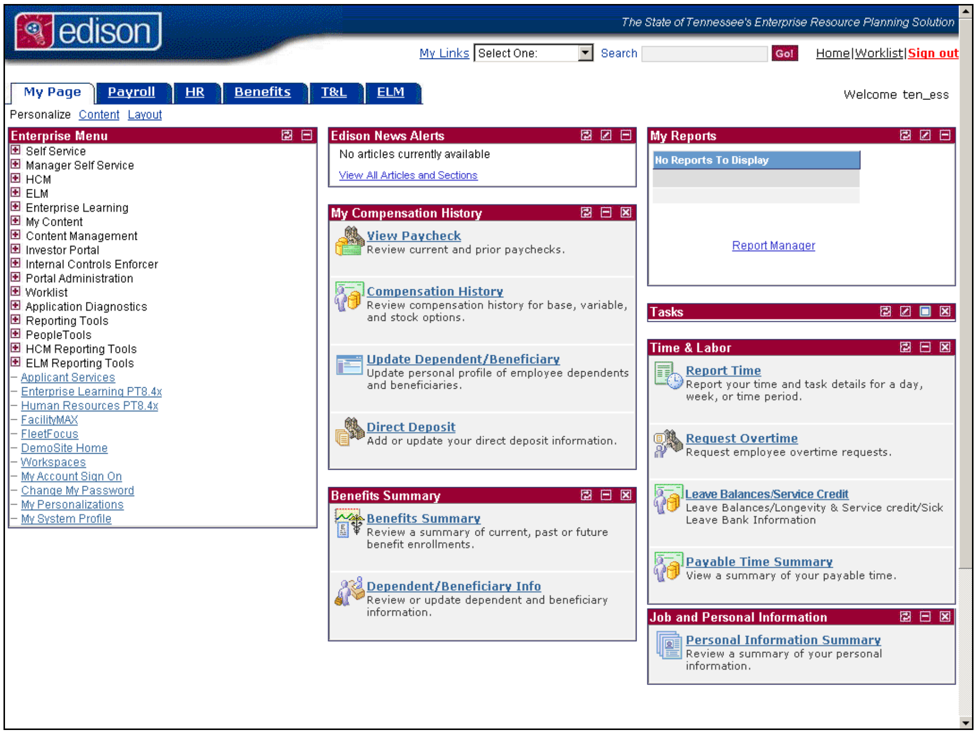
Step	Action
17.	Click the **OK** button. OK
18.	Notice **AL** (Annual Leave) now appears in the **Reported Time Status**.
19.	If you are in doubt about whether you have accrued leave, key the corresponding TRC for the leave in which you have been approved, and let the system perform the automatic stepdowns.
20.	You have successfully **Reported Leave on Your Timesheet**. **End of Procedure.**

Viewing Your Payable Time Summary

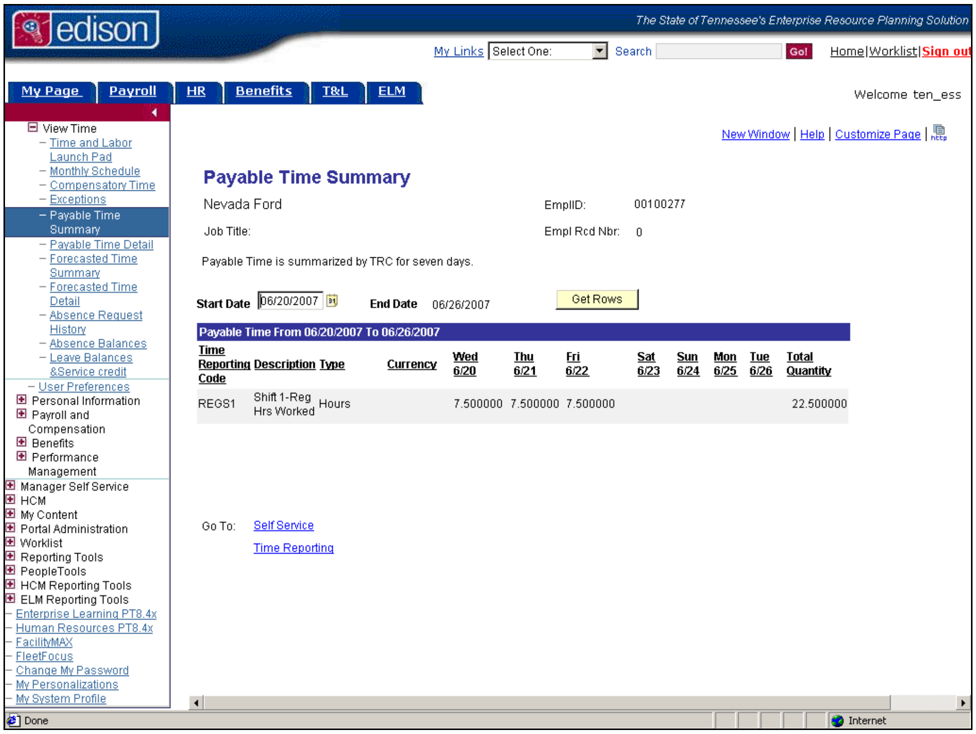
The **View Payable Time Summary** page displays one week of an employee's payable time, and is allocated by date then by TRC.

Procedure

In this lesson, we will view the **Payable Time Summary** for a week in which Regular Hours Worked (**REGS1**) and Annual Leave Hours (**AL**) were reported.



Step	Action
1.	Click the **Payable Time Summary** link. 



Step	Action
2.	To provide more room on the page, click the **Collapse** button.
3.	The information displays for only one week at a time, and it is only necessary to enter a **Start Date.** The **End Date** will automatically adjust to one week after the **Start Date.** Click the **Choose a Date** button.
4.	Click the **17** link. 17
5.	Click the **Get Rows** button. Get Rows
6.	Notice that the time frame changed to reflect the date you indicated. For this time period, the employee has Regular Hours Worked (**REGS1**) and Annual Leave (**AL**).
7.	In this example, the employee is scheduled to work 37.5 hours per week. We know that all hours have been accounted for by adding up the **Total** hours which sum 37.5. The **Total** hours should reflect, at least, the number of scheduled hours for each week.

Step	Action
8.	You have successfully viewed the **Payable Time Summary.** **End of Procedure.**

Reported Time versus Payable Time

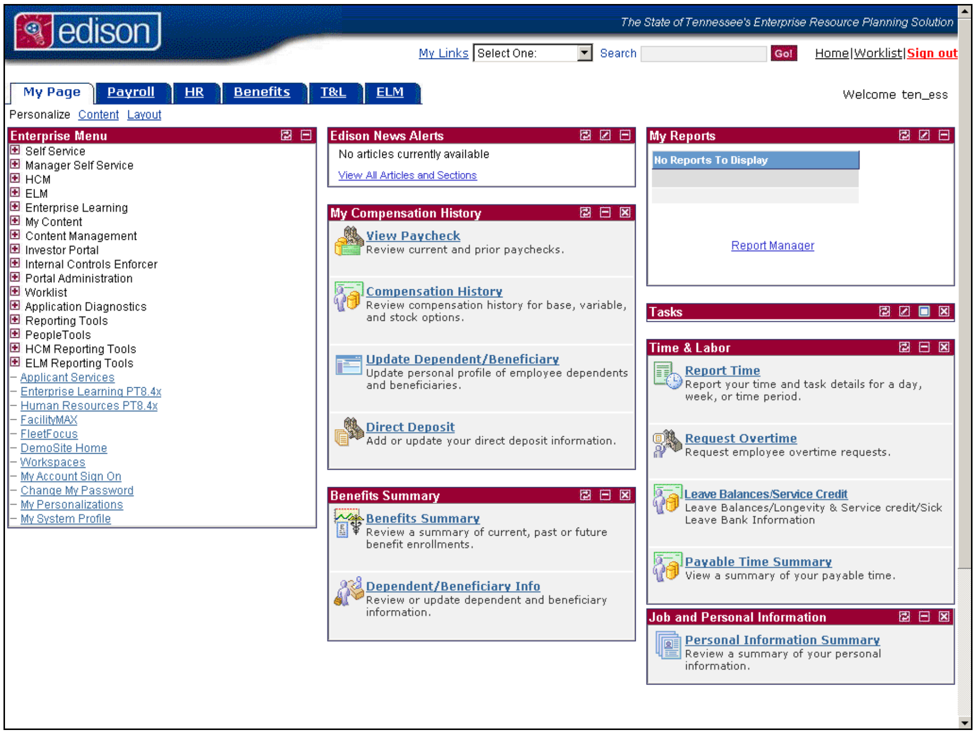
The time entered on the timesheet is known as **Reported Time** until **Time Administration** runs and produces **Payable Time**. The **Payable Time** may look different than the **Reported Time** for several reasons. One example is when an employee works time in excess of their regularly scheduled hours. The timesheet (reported time) will show regular hours worked, but **Time Administration** creates the payable time to reflect regular or premium overtime or compensatory overtime, based on the employee's Fair Labor Standards Act (FLSA) eligibility.

Procedure

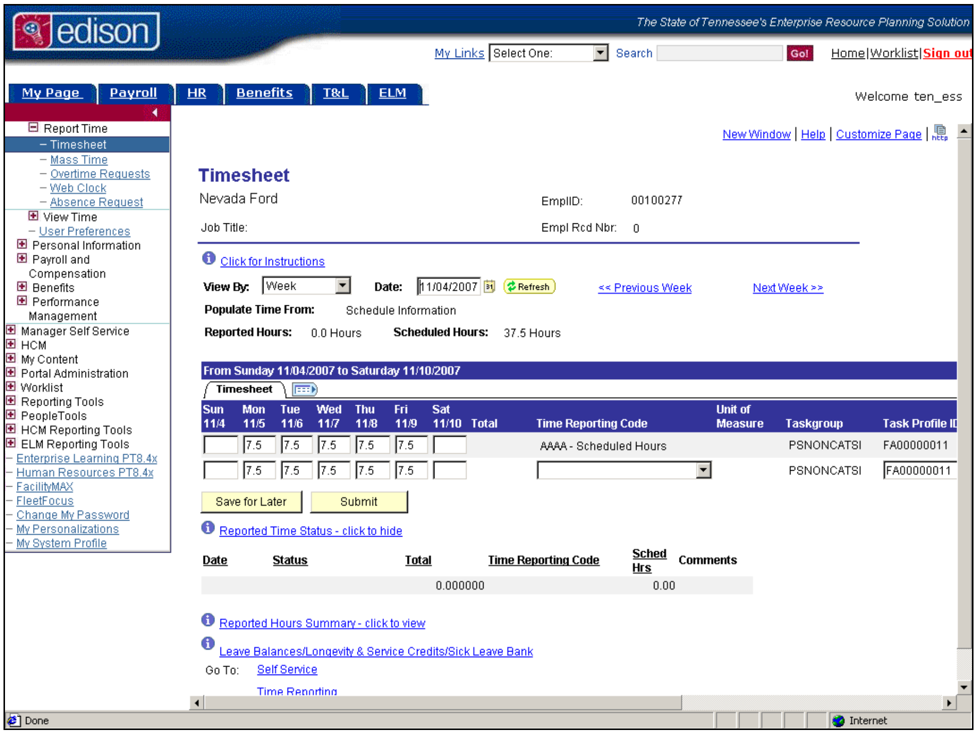
In this lesson, an employee is scheduled to work a 37.5 hour workweek. However, the employee actually worked 10 hours on Monday and 10 hours on Tuesday, so we need to update the timesheet. Once we enter the additional time, we will submit the timesheet.

Based on the eligibility rules, the system will process the reported time and determine what should be done with the time exceeding the employee's scheduled hours. The employee is eligible for cash overtime, so this will result in the generation of 2.5 hours of regular overtime and 2.5 hours of premium overtime.

Keep in mind that payable time may look different than reported time. If you have any questions about payable time, please contact your Time and Labor Administrator.

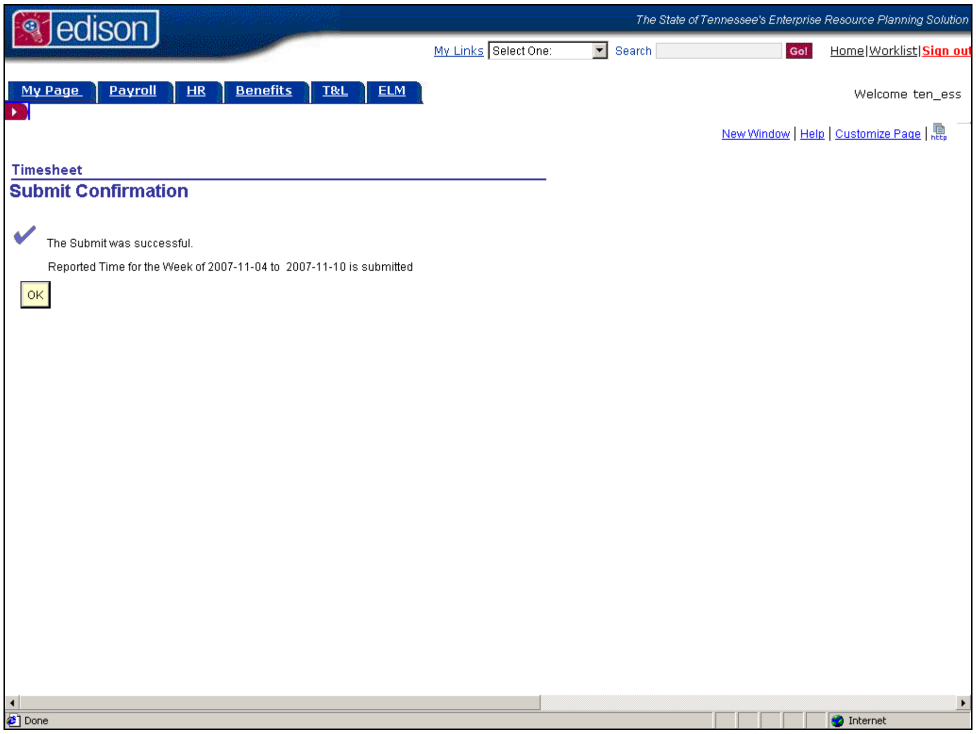


Step	Action
1.	Click the **Report Time** link. Report Time

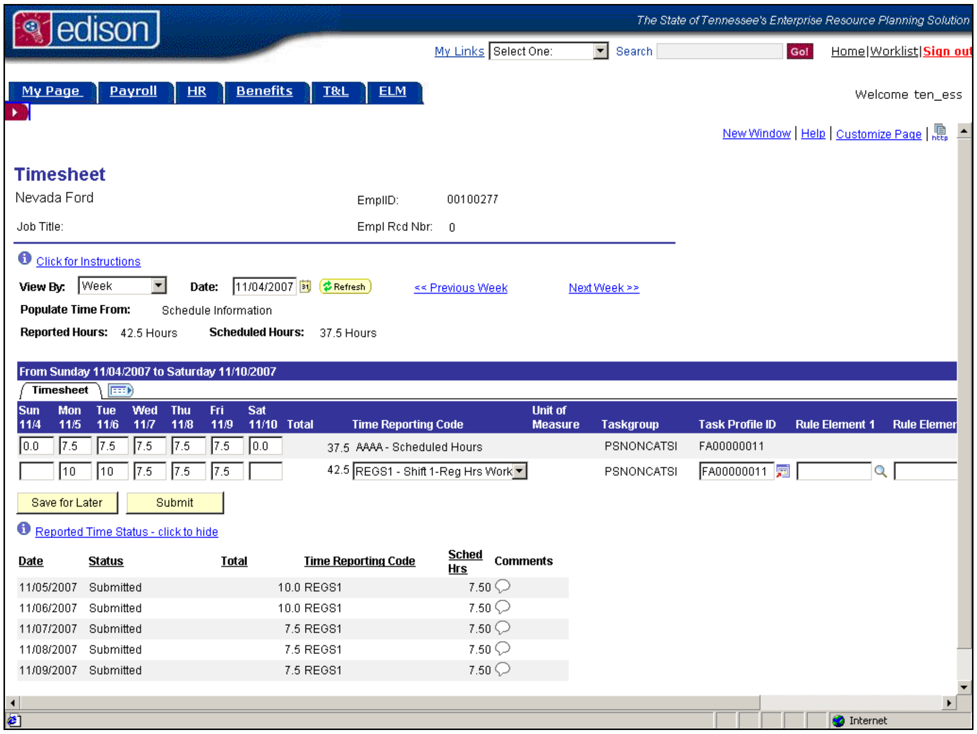


Step	Action
2.	To provide more room on the page, click the **Collapse** button.
3.	We need to change the reported hours to reflect the time worked in excess of the scheduled hours.
4.	Click in the **Mon 11/5** field. 7.5
5.	Press **[Backspace]**.
6.	Enter the desired information into the **Mon 11/5** field. Enter "**10**".
7.	Click in the **Tue 11/6** field. 7.5
8.	Press **[Backspace]**.
9.	Enter the desired information into the **Tues 11/6** field. Enter "**10**".
10.	Click the **Time Reporting Code** list.
11.	To quickly navigate to the TRC you wish to use, enter the first letter of the TRC into the **Time Reporting Code** field. Enter "**r**".
12.	Click the scrollbar.
13.	Click the **REGS1 - Shift 1-Reg Hrs Worked** list item. REGS1 - Shift 1-Reg Hrs Work

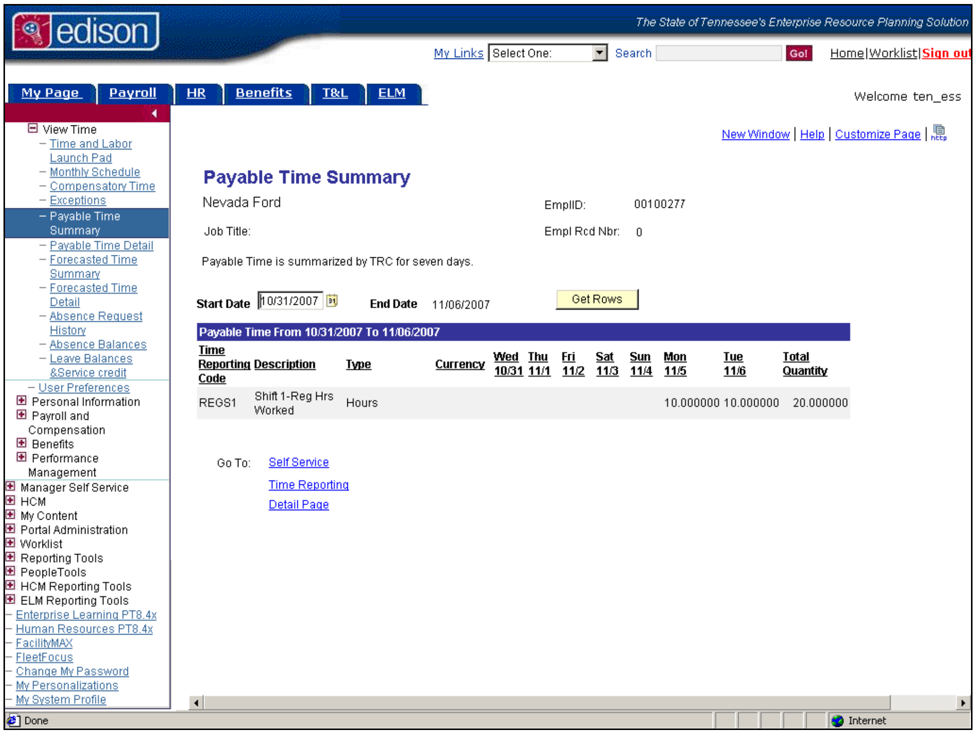
Step	Action
14.	Click the **Submit** button. 



Step	Action
15.	Click the **OK** button. 
16.	The time has been successfully submitted. This reported time will not become payable time until the **Time Administration** process runs and applies the rules to the timesheet. The **Time Administration** process is scheduled to run nightly.
17.	In this example, Time Administration has run, so we will now examine how the payable time can differ from the time reported on the timesheet. Begin by navigating to the **Payable Time Summary** page.



Step	Action
18.	Click the **My Page** tab. 
19.	Click the **Payable Time Summary** link. 



Step	Action
20.	Click the **Collapse** button. 
21.	Click the **Choose a date** button. 
22.	Click the month list. 
23.	Click the **November** list item. November
24.	Click the **4** link. 4
25.	Click the **Get Rows** button. Get Rows
26.	Notice that the time frame changed to reflect the date you indicated. For this time period, the employee has regular time (**REGS1**), regular overtime (**ROT**), and premium overtime (**POT**). The employee worked a total of 5 hours of overtime, 2.5 hours of regular (**ROT**) and 2.5 hours of premium (**POT**). **POTX5** is listed for labor distribution purposes only.

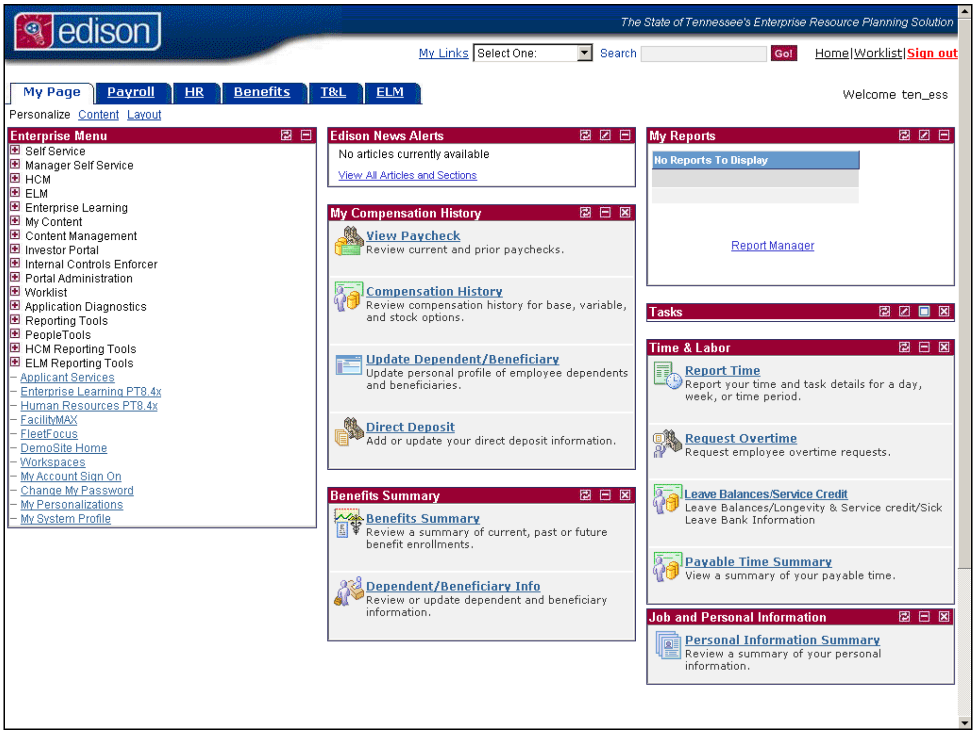
Step	Action
27.	If you receive cash overtime, an exact match of **Regular Overtime (ROT)** hours for regular overtime and an exact match of **Premium Overtime (POT)** hours for premium overtime will display in payable time. For all occurrences of **POT** you will see a matching value of **Premium Overtime Half Rate (POTX5)** which will be used to pay the half time rate. For example: **POT**= 6 hours, **POTX5** = 6 hours
28.	If you are only eligible to receive **Regular Compensatory Overtime (RCOT)**, only **RCOT** will appear on the **Payable Time Summary**, regardless of the number of hours worked in excess of scheduled hours.
29.	If you are eligible to receive **Premium Compensatory Overtime (PCOT)**, an exact match of **Regular Compensatory Overtime** (**RCOT**) hours for regular overtime, and an exact match of **Premium Compensatory Overtime** (**PCOT**) hours for premium overtime will appear on the **Payable Time Summary** page. In addition to the **PCOT**, you will see **Premium Compensatory Overtime - Half Rate (PCOT5**). The value of **PCOT5** is half the **PCOT** value which represents the half portion of premium comp time earned. For example: **PCOT**=6 hours, **PCOT5** = 3 hours
30.	As demonstrated, payable time may look different than reported time. It is important that you contact your Time and Labor Administrator immediately with any questions as opposed to re-submitting your timesheet.
31.	You have successfully reviewed **Reported Time versus Payable Time**. **End of Procedure.**

Holiday Time Reporting

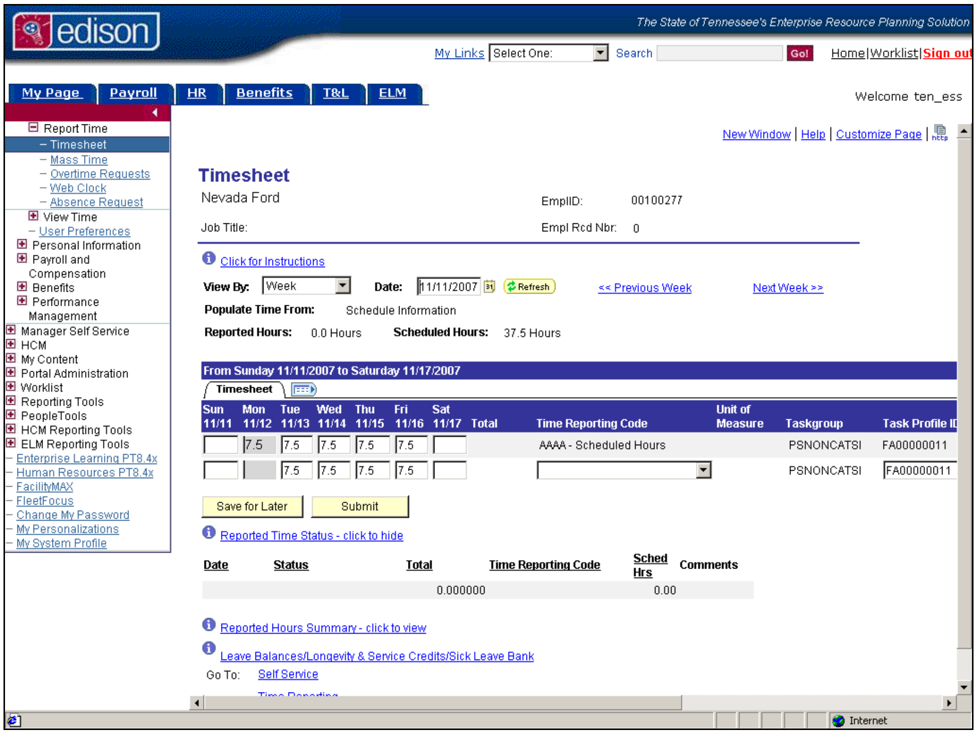
Holiday Time is automatically generated as payable time in Edison for eligible employees. This means that hours for the holiday should NOT be reflected on your timesheet as reported time, unless you actually work on the holiday. Therefore, when you view your timesheet, the gray field should remain blank and you will be compensated for the holiday, if eligible.

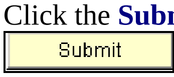
Procedure

In this lesson, we will submit time for the week beginning November 11th, identifying the Veteran's Day holiday on November 12th.

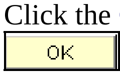


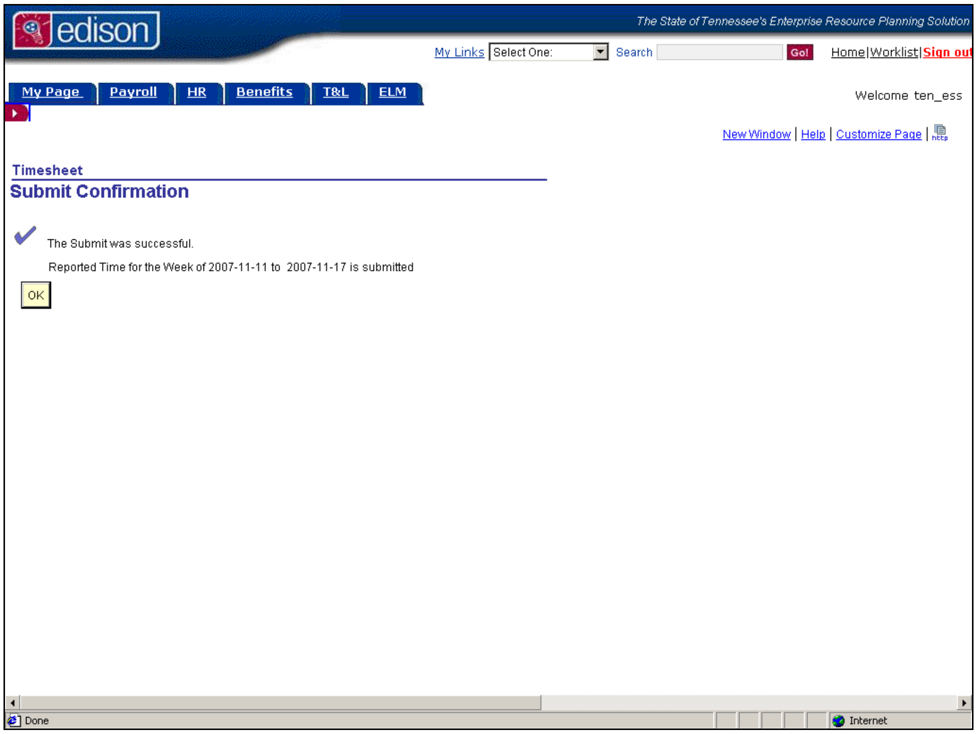
Step	Action
1.	Click the **Report Time** link. Report Time



Step	Action
2.	To provide more room on the page, click the **Collapse** button. 
3.	**Note:** Holidays will automatically appear with a gray background. The scheduled hours row will still have the regularly scheduled hours in the Holiday field(s), but the 2nd row for reporting time will be blank.
4.	In this example, Veteran's Day (**11/12**) is an observed State Holiday. The field should remain blank if you did not work the holiday. If you did work the holiday, then the appropriate number of hours should be recorded on the timesheet.
5.	Before we can submit the timesheet, we need to assign a TRC to the reported time.
6.	Click the **Time Reporting Code** list. 
7.	Use the scrollbar to find the appropriate TRC or enter the first letter of the TRC into the **Time Reporting Code** field to quickly navigate to the TRC you wish you use. Enter "**r**".
8.	Click the **REGS1 - Shift 1-Reg Hrs Worked** list item. 
9.	Click the **Submit** button. 

Step	Action
10.	The system is alerting us that there is a holiday on November 12th. Press **OK** to acknowledge the message and continue submitting the timesheet. Press **Cancel** to return to the timesheet to make modifications to the reported time.

Step	Action
11.	Click the **OK** button. 



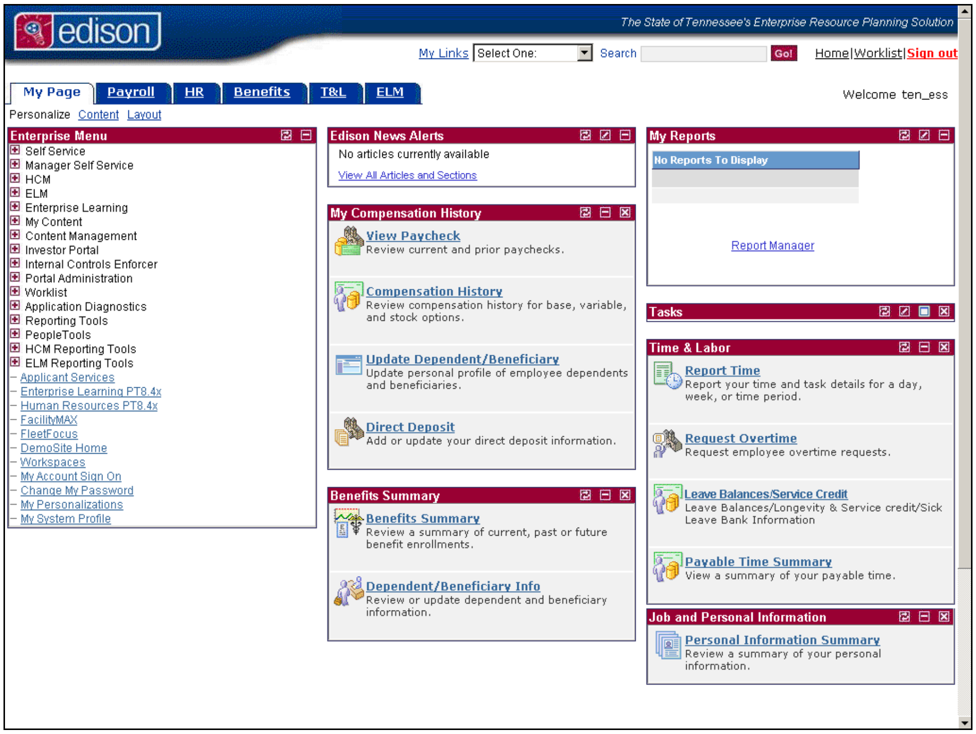
Step	Action
12.	Click the **OK** button. 
13.	If the employee is eligible, the system will generate **Holiday Pay** when the Time Administration process runs and will be viewable on the **Payable Time Summary** page.
14.	You have successfully reported time for a holiday. **End of Procedure.**

Viewing Leave Balances, Service Credits, and SLB Information

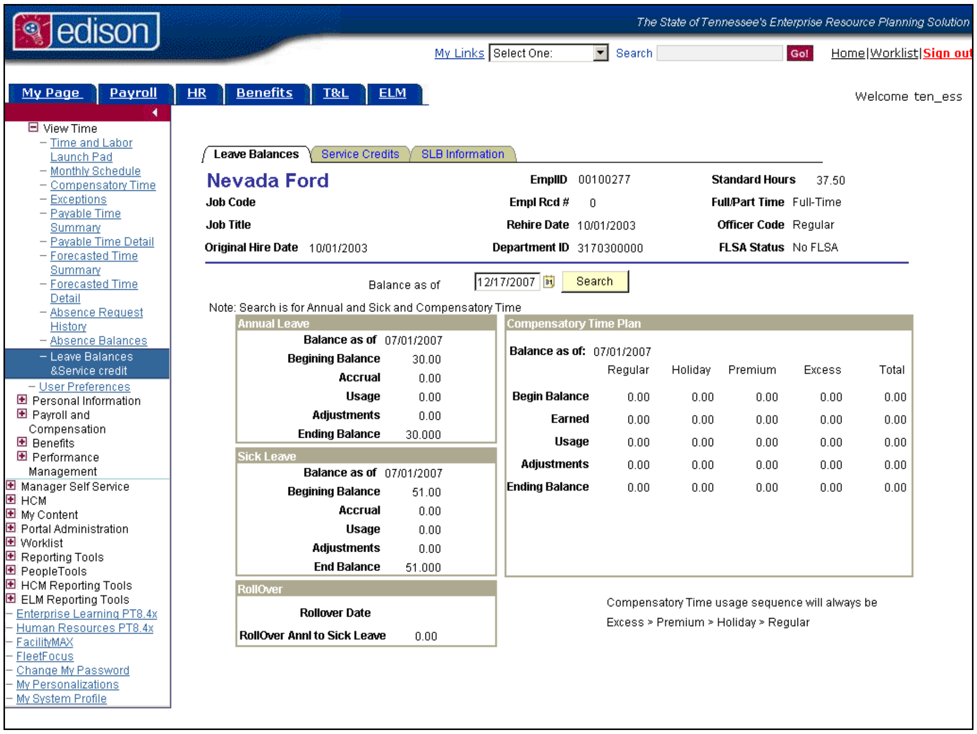
As a State employee, you may be accustomed to viewing your leave balances either on your printed pay stub or directly from the Data Capture system. Leave Balances, Service Credits, and information about enrollment in the Sick Leave Bank are all available on a single page in Edison through Employee Self Service. This lesson will show the navigation to this page and discuss some of the major items of interest.

Procedure

In this lesson, you will learn how to view Leave Balances, Service Credits, and Sick Leave Bank enrollment information.

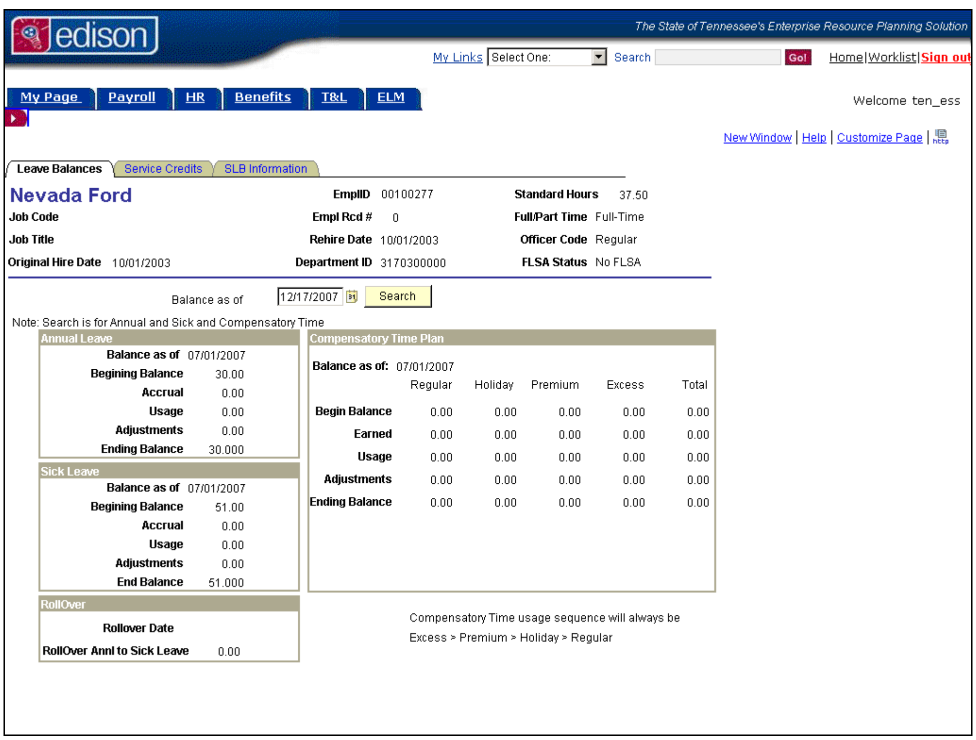


Step	Action
1.	Click the **Leave Balances/Service Credit** link. Leave Balances/Service Credit

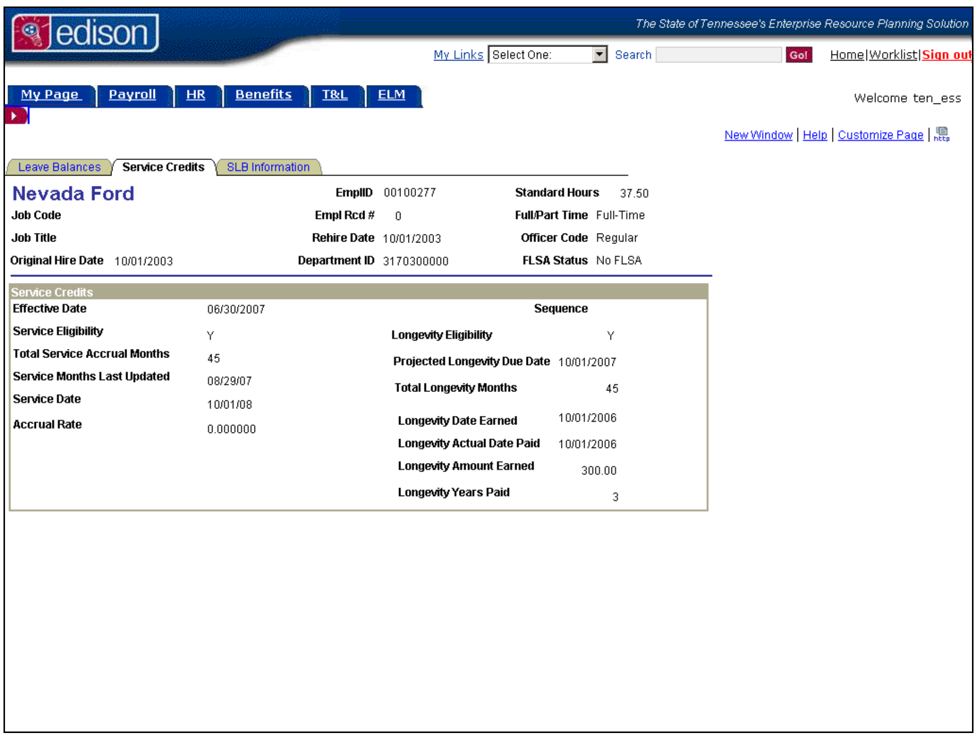


Step	Action
2.	To provide more room on the page, click the **Collapse** button.
3.	The top of the page on each tab provides your job information.
4.	All leave balances are clearly displayed on this page. This page displays **Annual Leave**, **Sick Leave**, **Yearly Annual Rollover Balance**, and **Compensatory Time Plan** information. Each type of leave displays a **Balance as of** date, a **Beginning** and **Ending Balance**, the **Accrual**, the **Usage**, and the **Adjustments** for the time period.

Step	Action
5.	There are four main buckets of compensatory time: **Regular, Holiday, Premium,** and **Excess**. **Regular** - comp time earned for hours worked in excess of regular scheduled hours. **Holiday** - comp time earned if an eligible employee works on a holiday. **Premium** - comp time earned by eligible employees calculated at 1.5 times the hours worked in excess of 40. **Excess** - under very specific circumstances, comp time earned in excess of the 480 hour maximum. Compensatory Time usage sequence will always be the following: **Excess, Premium, Holiday,** and **Regular**.
6.	As a reminder, annual and sick leave accruals are updated only once per month whereas leave usages are updated semi-monthly. Compensatory overtime balances are updated each pay period.



Step	Action
7.	Use the tabs across the top of the page to navigate to additional information. Click the **Service Credits** tab. 
8.	Information about service months and longevity is displayed on this page. Questions regarding information contained on this page should be referred to your Agency's HR Office.



Step	Action
9.	Click the **SLB Information** tab. 
10.	This page indicates whether you are enrolled in the Sick Leave Bank (SLB), and if so, provides enrollment information. Questions regarding information contained on this page should be referred to your Agency's HR Office.
11.	You have successfully viewed **Leave Balances, Service Months, and Sick Leave Bank** enrollment information. **End of Procedure.**

Overtime Request

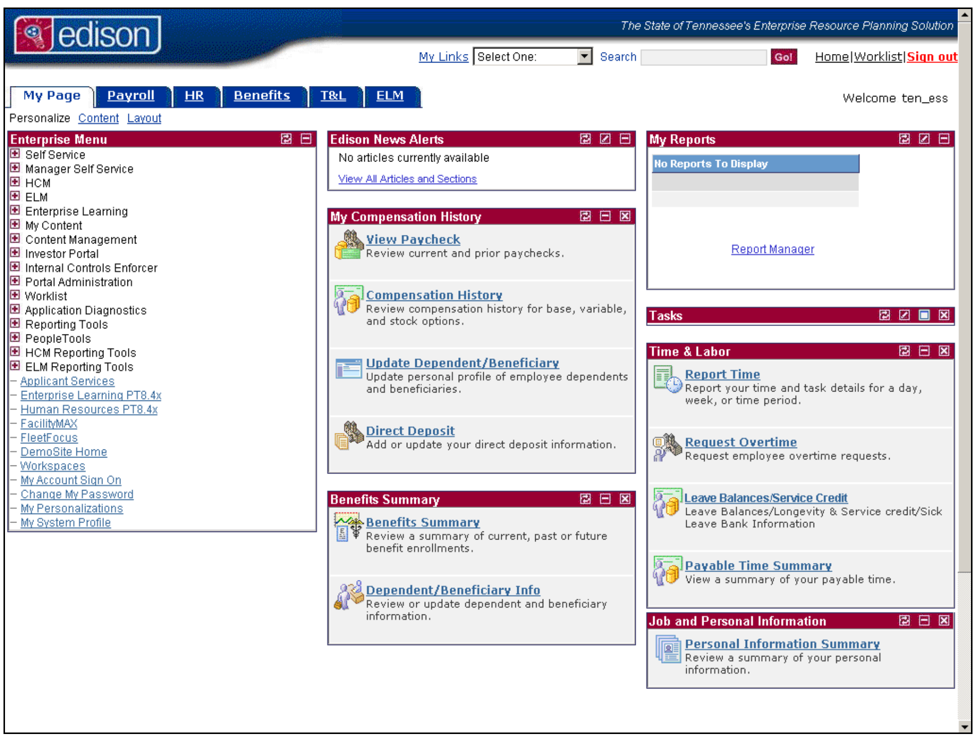
In order to enter time on your timesheet in excess of your regularly scheduled hours, you first need to submit an **Overtime Request.** Before the overtime is entered on your timesheet, the request must be approved by the appropriate supervisor.

One request can cover an entire week. For example, you can enter a request on Monday for 10 hours. If the request is approved, you can work up to 10 hours over your scheduled hours for the week. If you find that you need to work additional time, you would have to submit an additional request for the hours in addition to those approved.

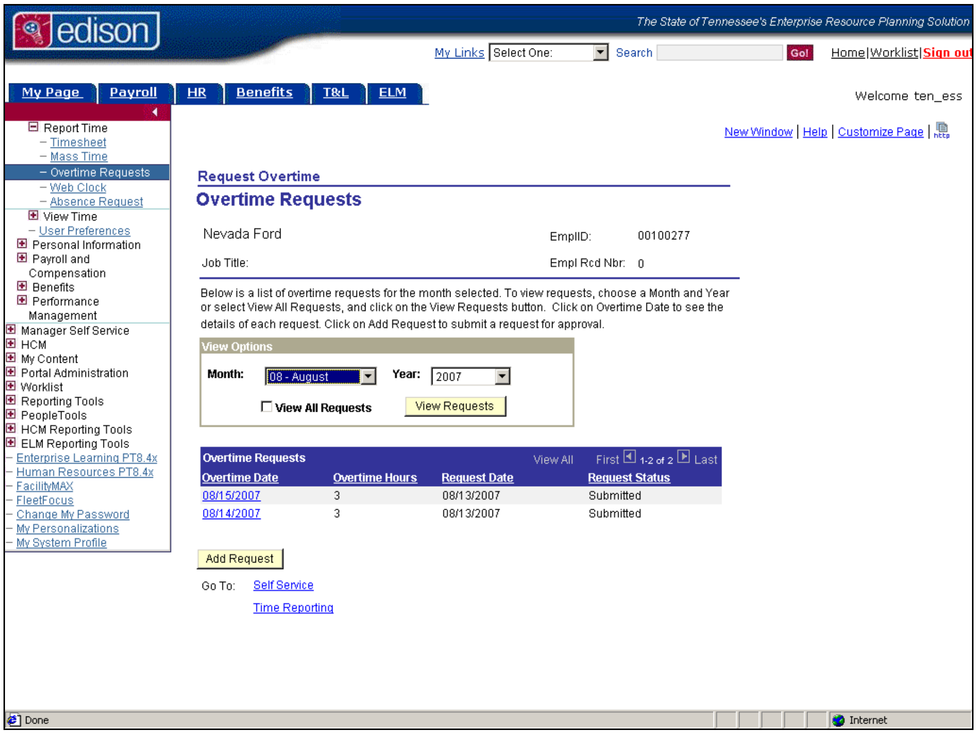
Procedure

In this lesson, you will be entering a request for three hours of overtime on September 15th.

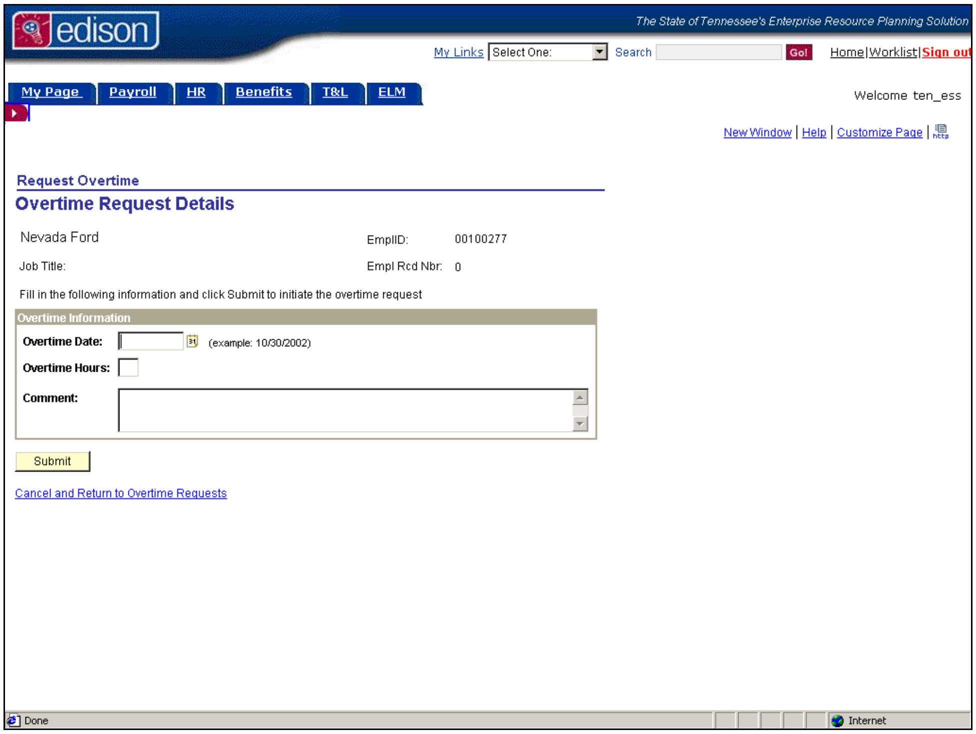
An **Overtime Request** is completed and approved before the overtime worked can be entered on your timesheet.

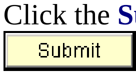


Step	Action
1.	Click the **Request Overtime** link. Request Overtime

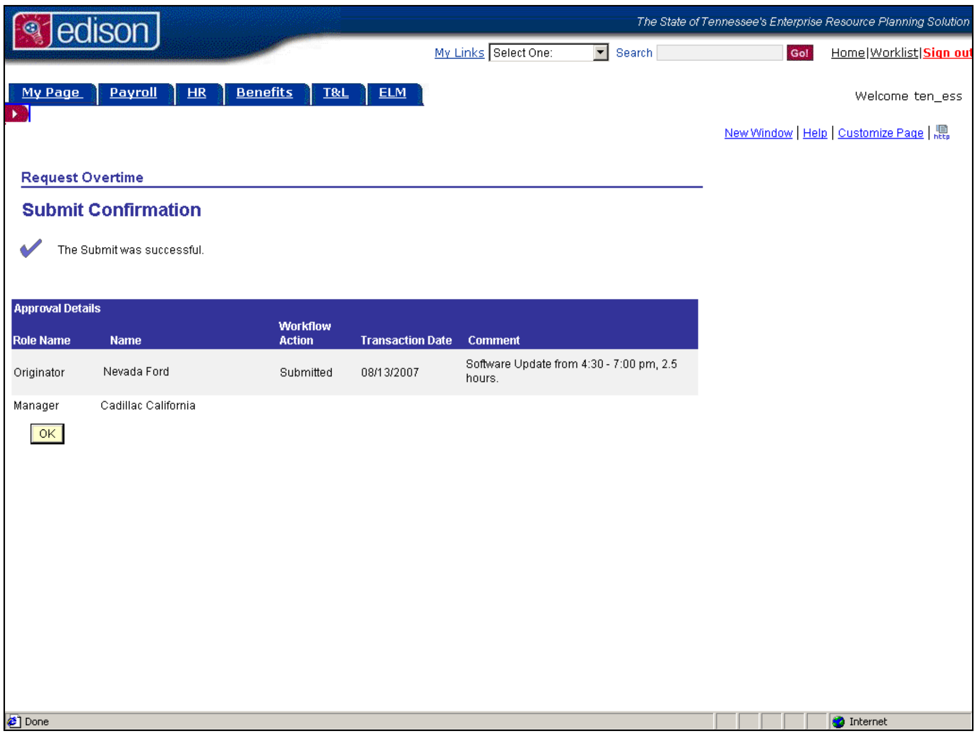


Step	Action
2.	To provide more room on the page, click the **Collapse** button. 
3.	The current month and year default in the **View Options** box.
4.	To view overtime requests for a particular month and year, select the appropriate items from the drop down list.
5.	To view all available requests that you have submitted, select the **View All Requests** checkbox and click the **View Requests** button.
6.	All overtime requests for August 2007 are listed. The **Overtime Date**, **Overtime Hours**, **Request Date** (date the request was originally completed), and the **Request Status** are displayed for each request. To view more details about a particular request, click on the actual date of the overtime request (i.e. 08/15/2007).
7.	To add a new request, click the **Add Request** button. 



Step	Action
8.	Enter the date you want to request overtime for into the **Overtime Date** field. Enter "**09/15/2007**".
9.	The **Overtime Hours** field only accepts whole numbers, therefore if you need to work 2.5 hours of overtime, you would request 3 hours and in the comment field explain that you are only requesting 2.5 hours for your supervisor to review.
10.	Click in the **Overtime Hours** field. 
11.	Enter "**3**".
12.	The **Comment** field is used to explain the justification for the overtime request, the specific time period, and the actual number of hours being requested. Supervisors will review comments when approving/denying the overtime request.
13.	Enter "**Software Update from 4:30 - 7:00 pm, 2.5 hours.**"
14.	Click the **Submit** button. 

Step	Action
15.	The name of the **Originator** and the **Manager** are listed on the **Confirmation Page**, so you will know who needs to approve the request. **Note:** If your appropriate **Manager/Supervisor** is not listed, it is important that you contact either your timekeeper or TL Administrator.



Step	Action
16.	Click the **OK** button. OK
17.	You have successfully entered an **Overtime Request.** **End of Procedure.**

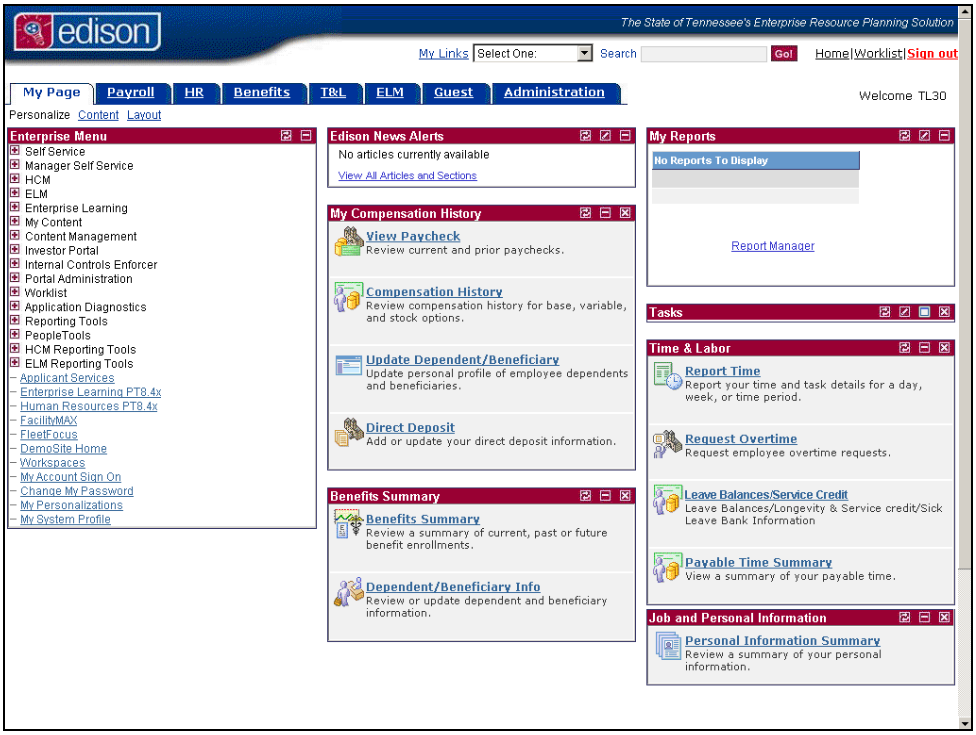
Leave Request

In order to enter leave on your timesheet, you first need to submit a **Leave Request.** Before the leave is submitted on your timesheet, the request must be approved by the appropriate supervisor.

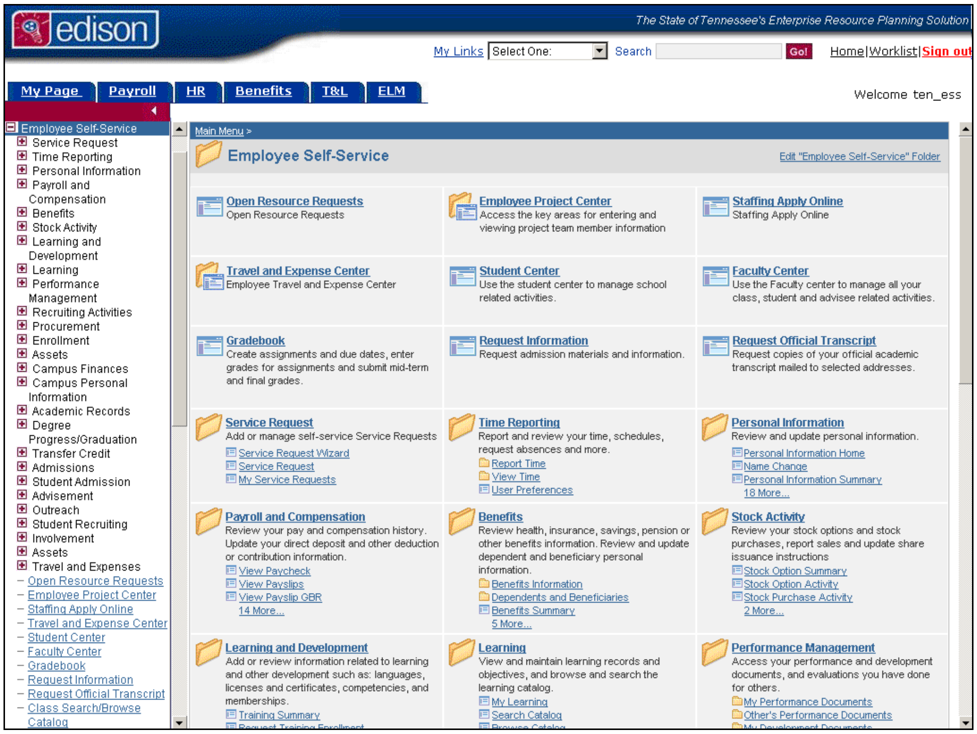
Procedure

In this lesson, you will be entering a request for 7.5 hours of annual leave on June 30th.

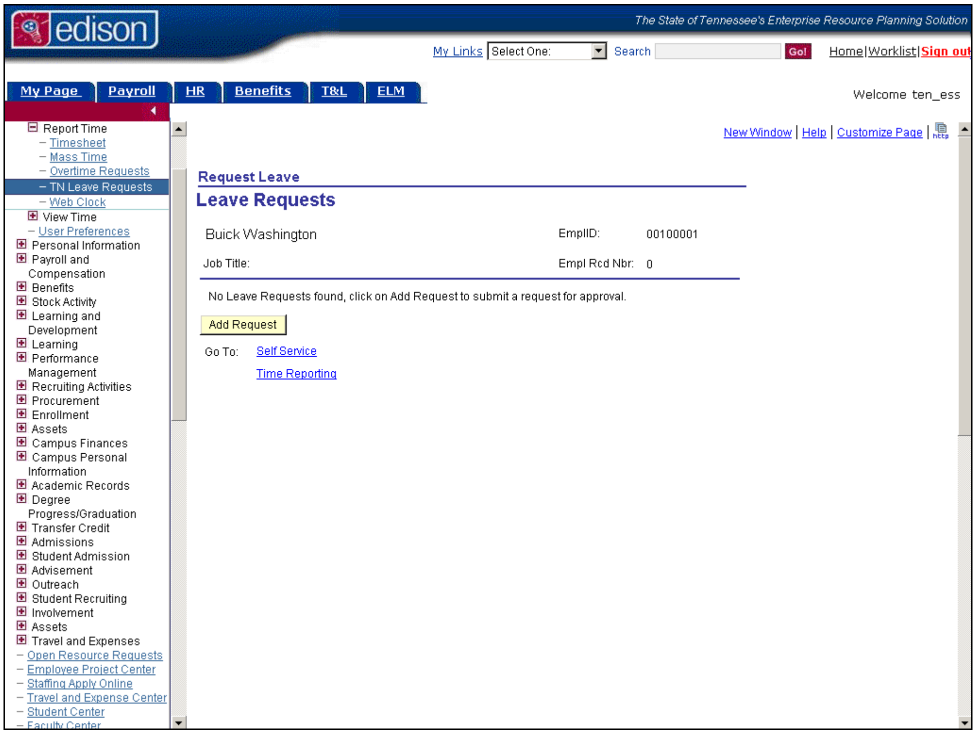
A **Leave Request** needs to be entered and approved before the leave can be submitted on your timesheet.



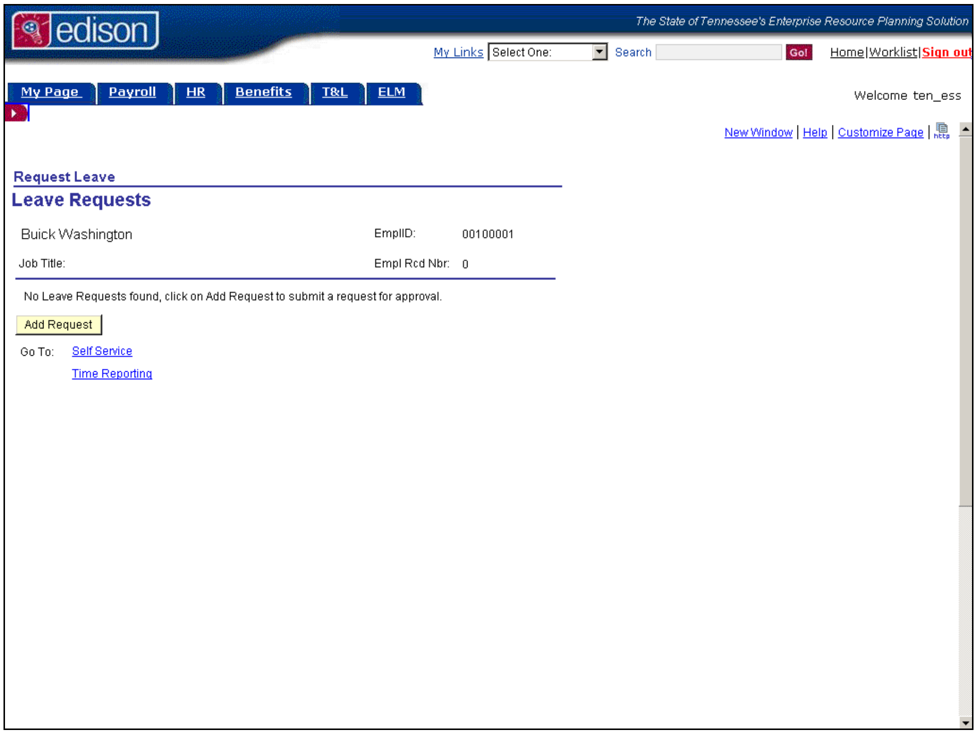
Step	Action
1.	Click the **Employee Self Service** link. 



Step	Action
2.	Click the **Time Reporting** link. Time Reporting
3.	Click the **Report Time** link. Report Time
4.	Click the **TN Leave Requests** link. TN Leave Requests

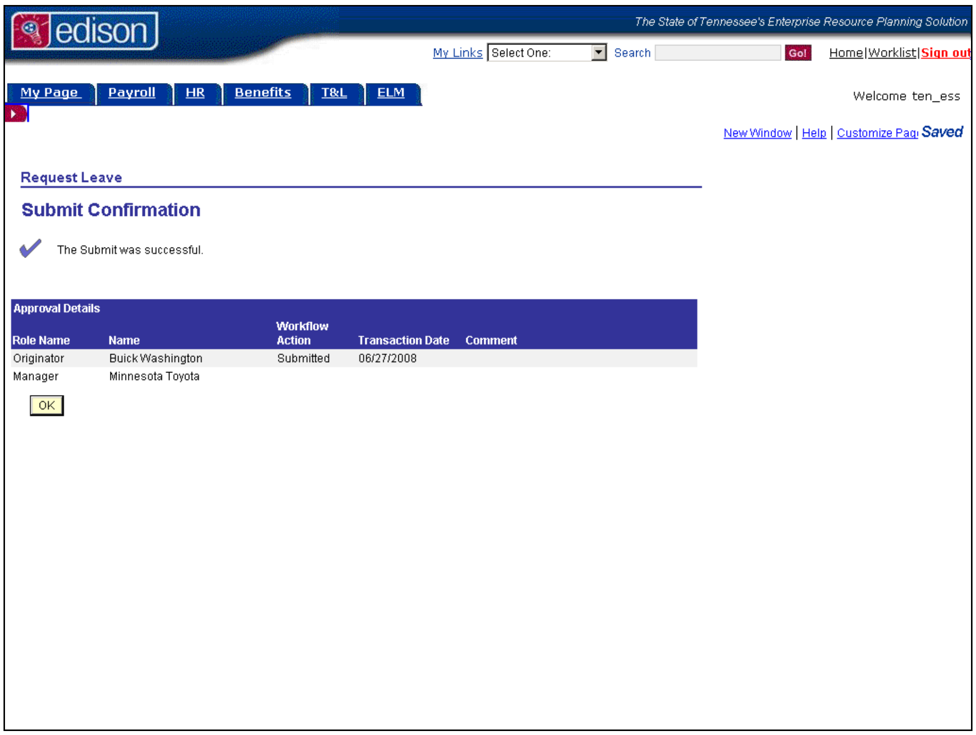


Step	Action
5.	Click the **Collapse** button. 



Step	Action
6.	Click the **Add Request** button. Add Request
7.	Click the **Choose a date** button.
8.	Click the **30** link. 30
9.	Click in the **Leave Hours** field.
10.	Enter the desired information into the **Leave Hours** field. Enter "**7.5**".
11.	Click the **Leave Type** list.
12.	Click the **Annual Leave** list item. Annual Leave
13.	Depending on the supervisor and agency, the required comments may vary. It is suggested that the specific time period and purpose for the leave be entered in the **Comment** field.
14.	Click the **Submit** button. Submit

Step	Action
15.	The name of the **Originator** and the **Manager** are listed on the **Confirmation Page**, so you will know who needs to approve the request. **Note:** If the appropriate **Manager/Supervisor** does not appear, it is important that you contact your TL Administrator.



Step	Action
16.	Click the **OK** button. OK
17.	This is the same page you navigated to when you initially opened the **Leave Requests** page. At this point, it has more detailed information since a request has just been submitted.
18.	The current month and year default in the **View Options** box.
19.	To view **Leave Requests** for a particular month and year, select the appropriate items from the drop down list.
20.	To view all available requests that you have submitted, select the **View All Requests** checkbox and click the **View Requests** button.

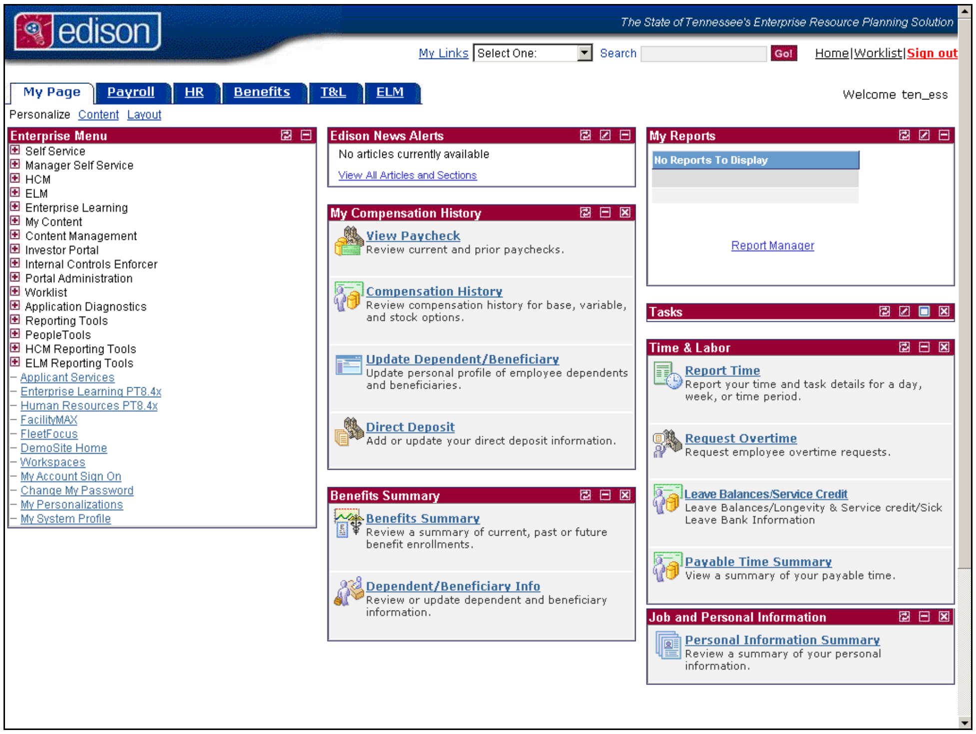
Step	Action
21.	All leave requests for June 2008 are listed. The **Leave Date**, **Leave Hours**, **Request Date** (date the request was originally completed), and the **Request Status** are displayed for each request. To view more details about a particular request, click on the actual date of the leave request (i.e. 06/30/2008).
22.	A separate **Leave Request** is required for each type of leave being requested and for leave that does not run concurrently. For example, two separate requests are required if an employee wishes to take 1 hour of annual leave on Monday and 1 hour of annual leave on Friday.
23.	You have successfully entered a **Leave Request**. **End of Procedure.**

Projects/Grants Labor Distribution Fields

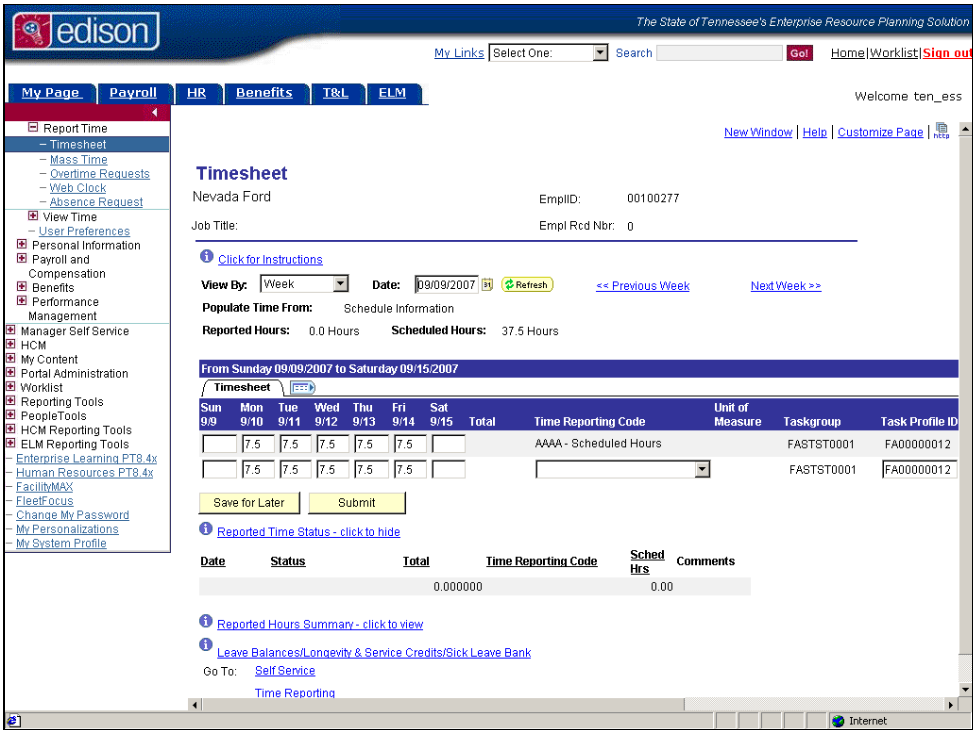
Labor Distribution is a key piece of functionality contained within Edison's Time and Labor module. This functionality utilizes codes known as "**Task Profiles**" on the timesheet to indicate the correct Financial chart fields (Accounting Codes) to which the time is charged. Task Profiles are organized into "**Taskgroups**" to which each employee is assigned. This allows each agency to organize **Task Profiles** to accommodate the needs and structure of their organization.

Procedure

In this lesson, we will be entering time for the week of 9/9/07 through 9/15/07. We will be charging the time to several different **Task Profiles**, ensuring that the labor cost, including overtime, is charged to the appropriate Task Profiles.

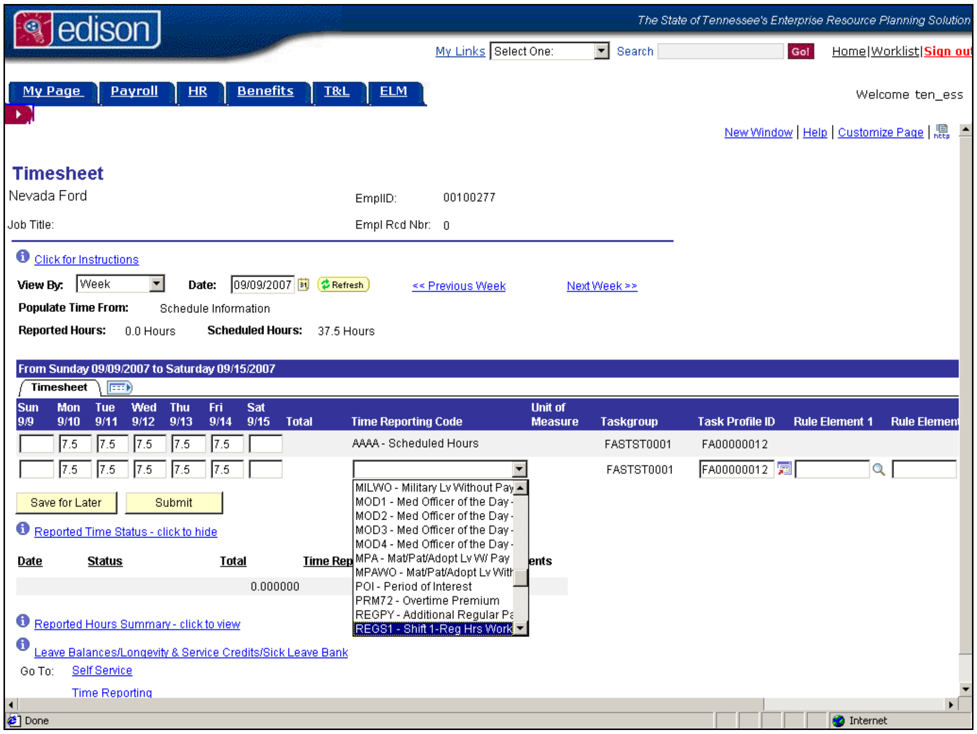


Step	Action
1.	Click the **Report Time** link. Report Time

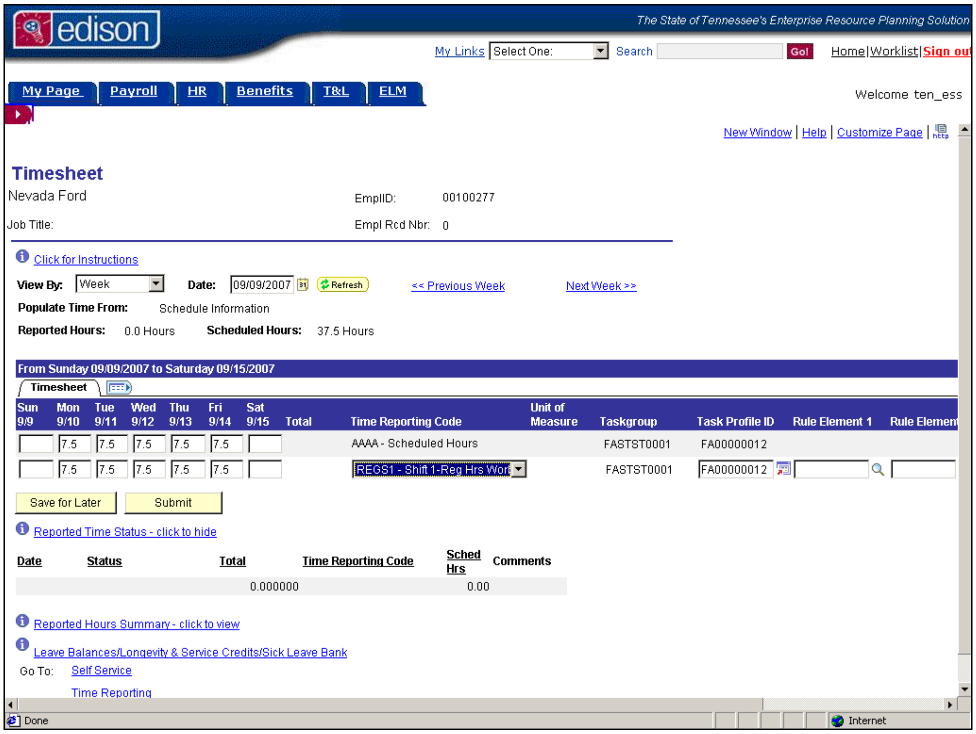


Step	Action
2.	To provide more room on the page, click the **Collapse** button. 
3.	If your agency requires labor distribution in Data Capture, you are familiar with allocating your time to Cost Centers. **Task Profiles** will replace Cost Centers, but the concept of using Cost Centers still applies. **Task Profiles** are assigned to an employee's time to account for payroll costs associated with a specific task which is designated by a **Task Profile ID**.
4.	Each employee will be assigned to a single **Taskgroup** which defaults on the employee's timesheet. A **Taskgroup** is a subset of an agency's **Task Profiles**. It is helpful to visualize a **Taskgroup** as a group of employees whose tasks are similar and, therefore, use the same **Task Profiles** to charge their time. The **Taskgroup** value defaults on the timesheet and will not require modification by the employee.
5.	Each row on the timesheet requires that a **Time Reporting Code (TRC)** be entered. However, there is not an overtime TRC because the system will be calculating overtime based on the employees FLSA time reporting period during the Time Administration process. Normally, all hours worked on a particular day will simply be recorded using the regular hours (**REGS1**)worked TRC. When the timesheet is processed, the amount of overtime (including regular and premium) is calculated.

Step	Action
6.	In this example, we wish to indicate that the cost of the overtime worked on Monday be allocated to a specific Task Profile. To accomplish this, we use the **Anticipated Overtime (ANTOT) TRC**. Using this particular TRC tells the system that if overtime is earned in this week, the overtime cost should first be charged to the rows on the timesheet having the TRC of **ANTOT - Anticipated Overtime**. If extra hours for the week are not worked, the anticipated overtime will be paid as regular hours. Communication will come from your Agency regarding the use of **Anticipated Overtime (ANTOT)**. Only use this TRC if you have been instructed to do so by your Agency.
7.	Notice that the timesheet is pre-populated with the scheduled hours. The schedule will not pre-populate for part time employees. In this example, we are going to add additional rows to the timesheet to identify time worked in excess of regular scheduled hours. We wish to charge the cost of this overtime to the task in which it was worked. The existing information should be updated to accurately reflect the amount of reported hours.
8.	In this example, the generated schedule was worked, using the Regular Hours Worked (**REGS1**) TRC and the default Task Profile of Region 1 Administrative Office (**FA00000012**), with the following exceptions: Monday - 2.5 Anticipated Overtime (**ANTOT**) hours worked in the East TN Licensure division (**FA00000014**). Wednesday - only 5.5 Regular Hours (**REGS1**) were worked on the default task profile (**FA00000012**) and 2.0 Regular Hours (**REGS1**) on the Stream Survey (**FA00000013**). Friday - 2.5 Anticipated Overtime (**ANTOT**) hours worked on the DARE Grant (**FA00000010**).
9.	Click the **Time Reporting Code** list.
10.	Use the scrollbar to find the appropriate TRC, or search for the appropriate TRC by entering the first letter of the TRC. In this example, the TRC "**REGS1-Shift1-Reg Hrs Worked**" will be used, therefore you enter the letter "**r**" into the **Time Reporting Code** field.

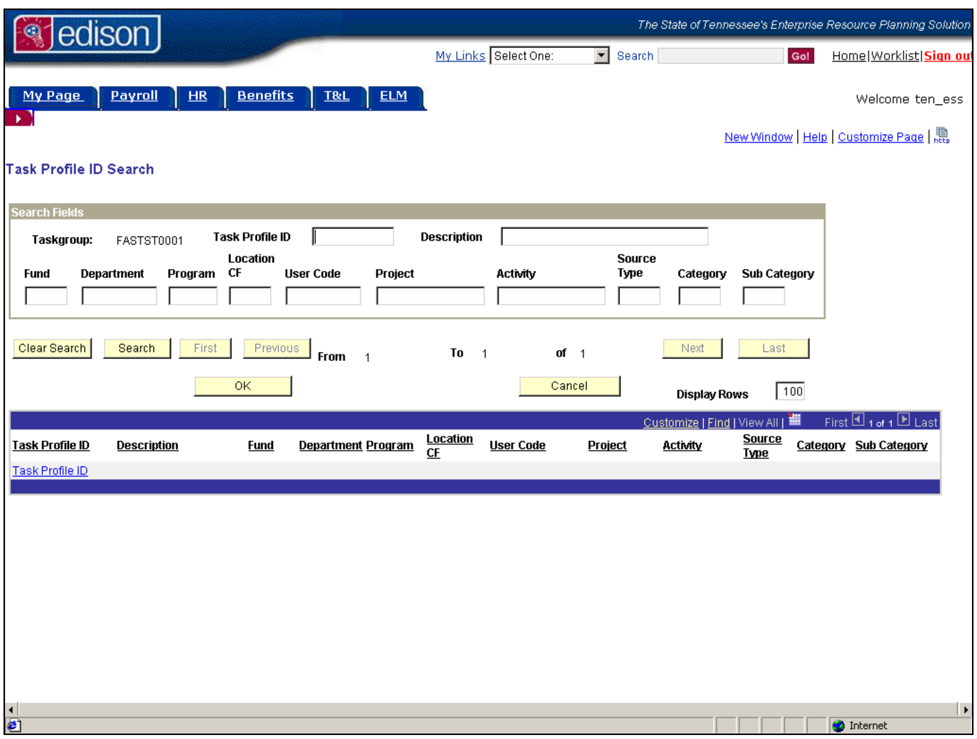


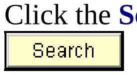
Step	Action
11.	Click the **REGS1 - Shift 1-Reg Hrs Work** list item. REGS1 - Shift 1-Reg Hrs Work



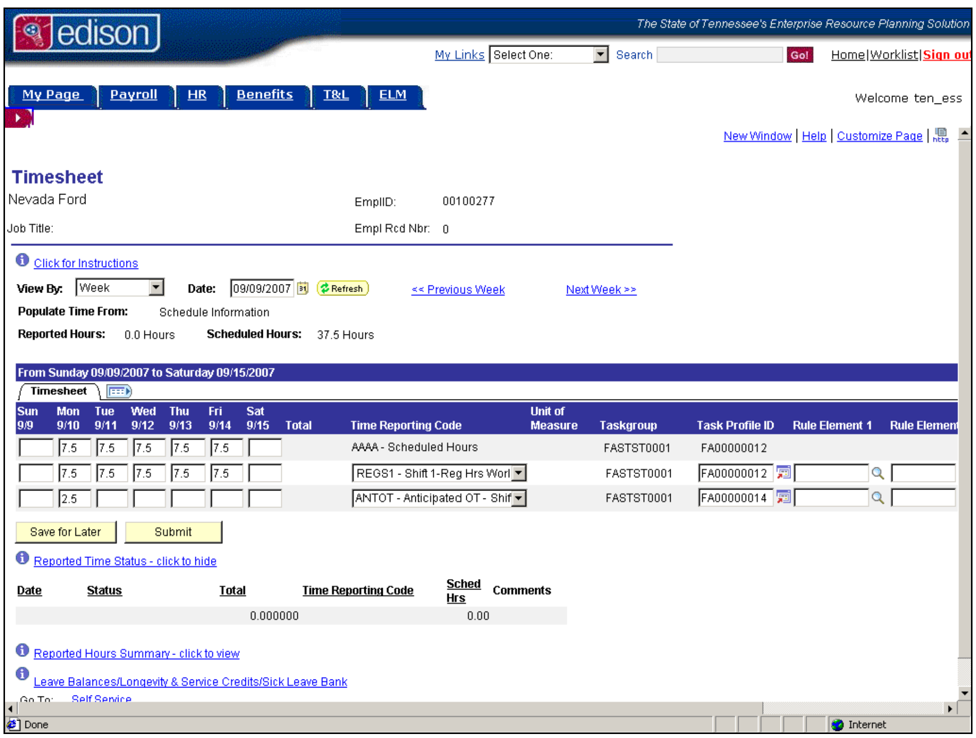
Step	Action
12.	Click the scrollbar.
13.	Click the **Add a new row** button. 
14.	Click in the **Mon 9/10** field. 
15.	Enter the desired information into the field. Enter "**2.5**".
16.	Click the **Time Reporting Code** list. 
17.	Edison calculates overtime according to the employee's FLSA time period. Therefore, the Anticipated Overtime TRC is selected to ensure the specific task (or Task Profile) that caused 2.5 hours of overtime will be charged the appropriate rate. Click the **ANTOT - Anticipated OT - Shift 1** list item. 

Step	Action
18.	In Edison, **Task Profile IDs** are auto numbered and may initially be unrecognizable. To see the description for Task Profiles and to find additional Task Profiles, the search page can be used. Click the **Task Profile Search** button to select the Task Profile that should be charged the 2.5 hours of Anticipated OT. 
19.	There are several ways to search for a **Task Profile ID** using any one field or combination of fields located in the **Search Fields** box at the top of the page. In this lesson we will cover three different ways to find a **Task Profile ID**. First, we want to see a list of all **Task Profile IDs** available for the employee. This would be a useful way to search if the employee only had a limited number of **Task Profile IDs.**
20.	Make sure all fields are cleared, then click the **Search** button. If necessary, use the **Clear Search** button.

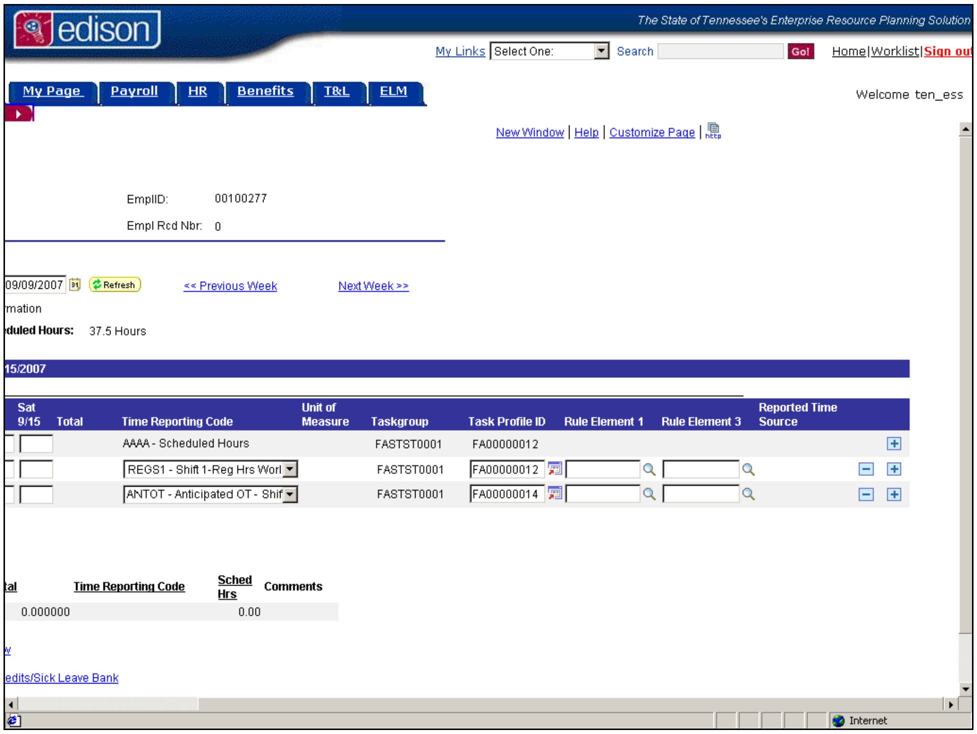


Step	Action
21.	Click the **Search** button. 

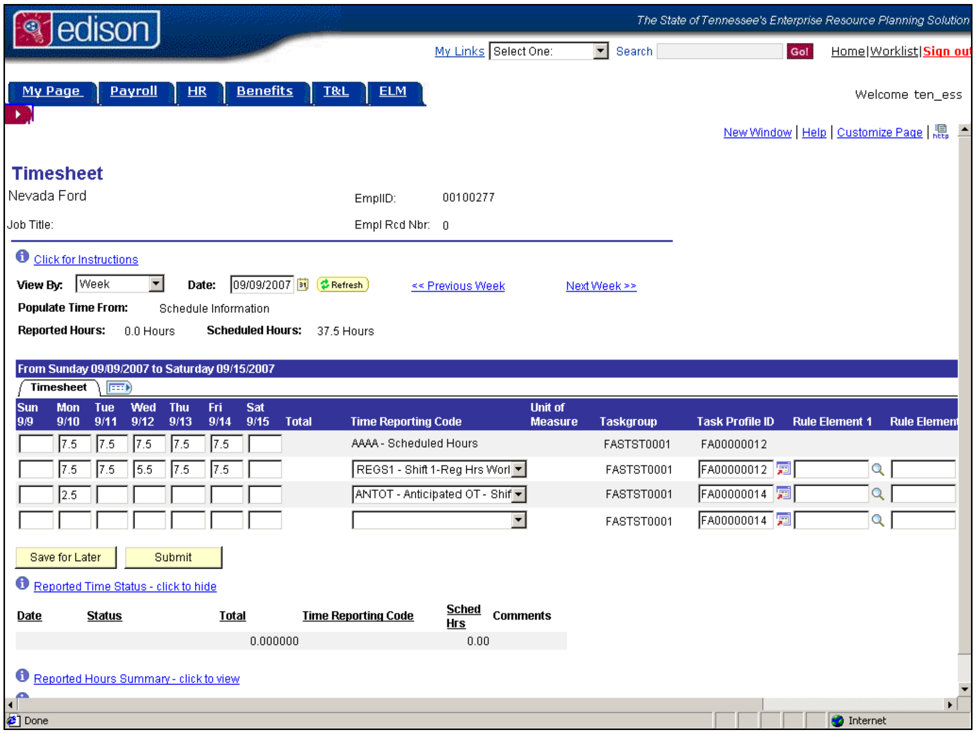
Step	Action
22.	Listed are all Task Profiles available for this employee's selection. Click on the **FA00000014** entry in the **Task Profile ID** column. FA00000014
23.	Notice that by clicking on a **Task Profile ID**, the Financial Chartfield information related to the Task Profile populates in the **Search Fields** box.
24.	Click the **OK** button. OK
25.	Notice that our first row of reported time will be charged to Task Profile ID Region 1 Administrative Office (**FA00000012**) and our second row of reported time will be charged to Task Profile ID East Tennessee Licensure (**FA00000014**).

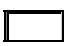


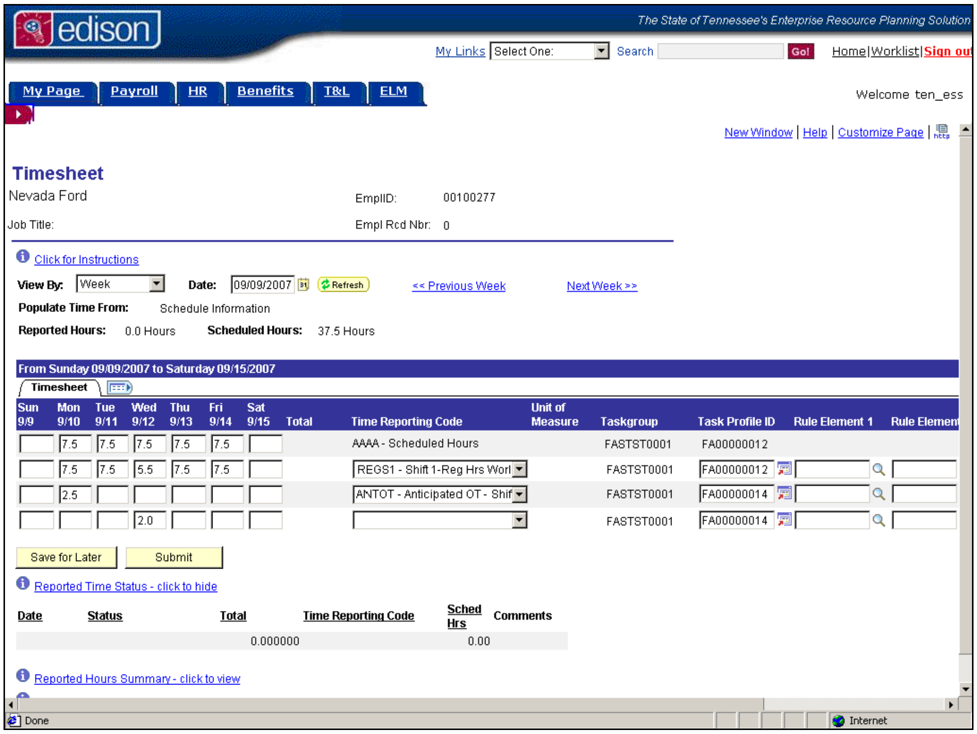
Step	Action
26.	Click the scrollbar.



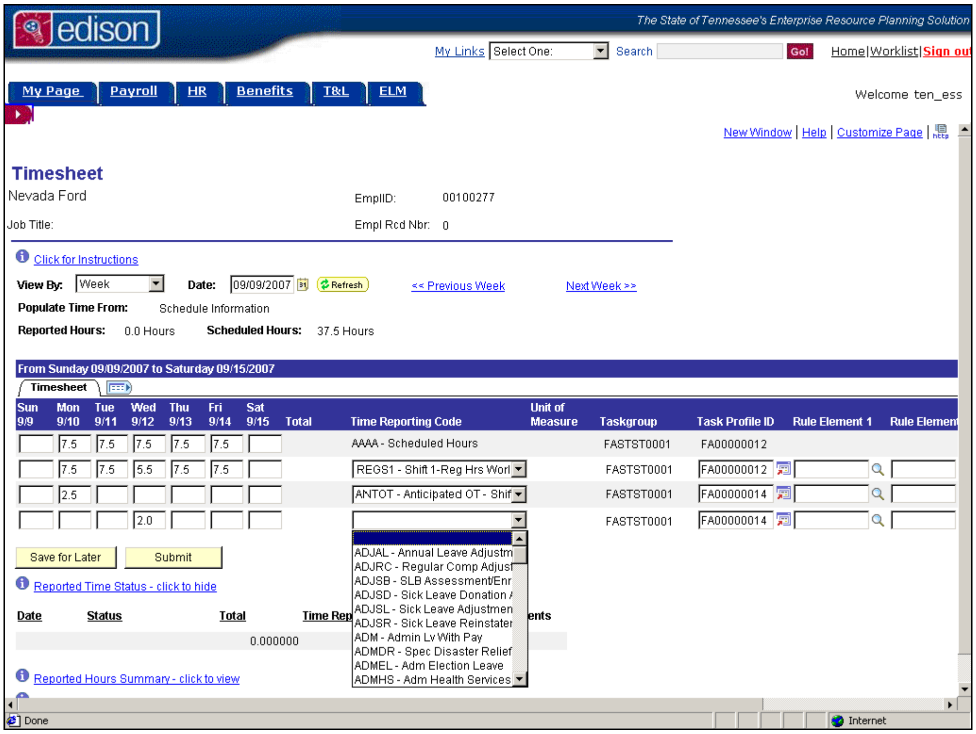
Step	Action
27.	Click the **Add a new row** button.
28.	As you can recall, there were not any changes to the hours worked on Tuesday. On Wednesday, the employee worked 5.5 hours on the default Task Profile of Region 1 Administrative Office (**FA000000012**) and 2.0 hours on the Stream Survey (**FA00000013**).
29.	Click in the **Wed 9/12** field for on the **REGS1** row. 7.5
30.	Enter the desired information into the field. Enter "**5.5**".



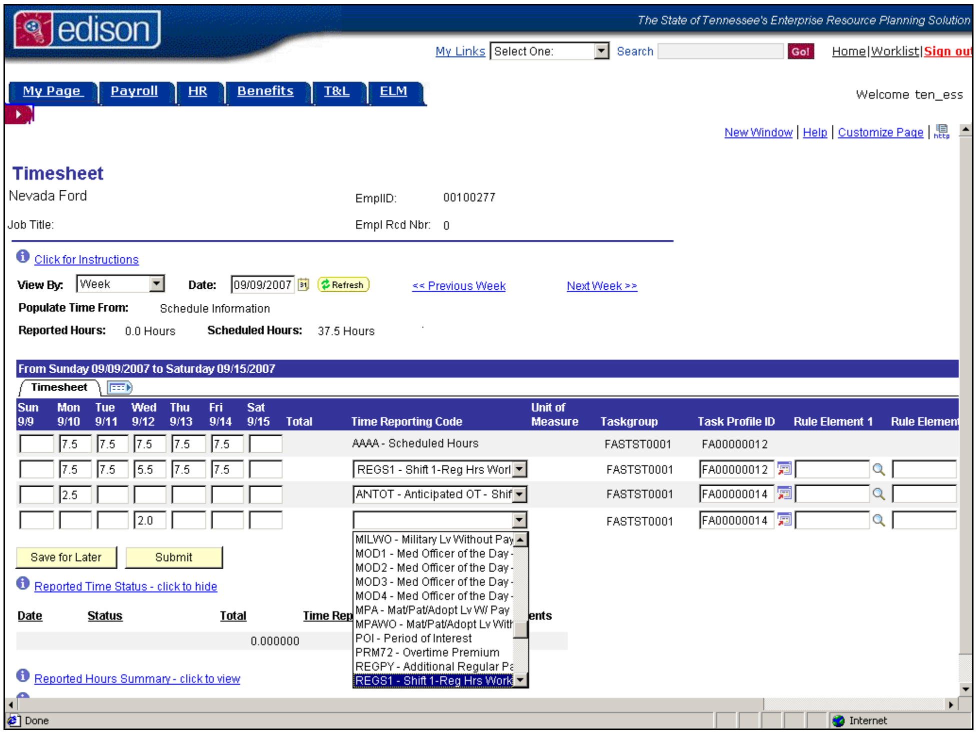
Step	Action
31.	Click in the **Wed 9/12** field on the newly created row. 
32.	Enter the desired information into the field. Enter "2".



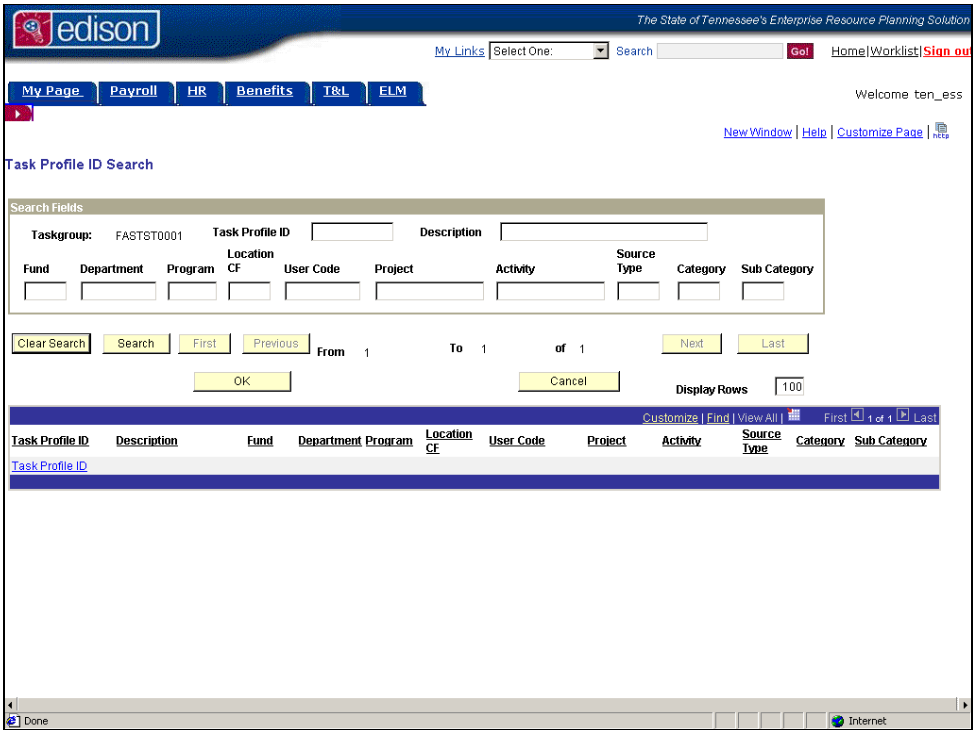
Step	Action
33.	Click the **Time Reporting Code** list.



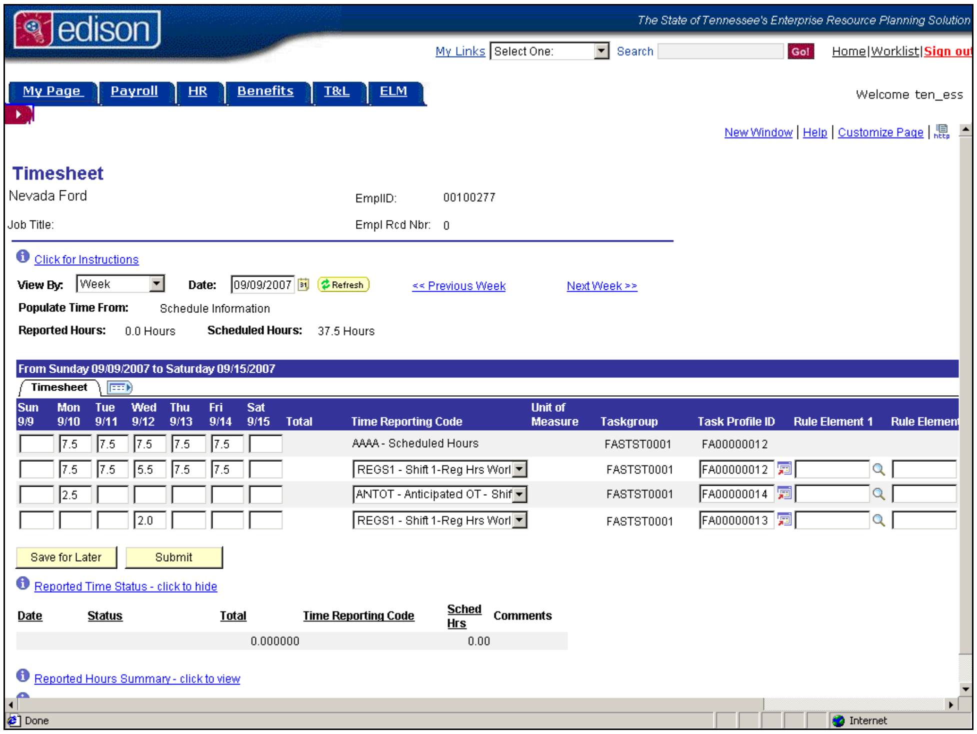
Step	Action
34.	Use the scrollbar to find the appropriate TRC, or search for the appropriate TRC by entering the first letter of the TRC. In this example, the TRC "**REGS1-Shift1-Reg Hrs Worked**" will be used, therefore you enter the letter "**r**" into the **Time Reporting Code** field.



Step	Action
35.	Click the **REGS1 - Shift 1-Reg Hrs Worked** list item. REGS1 - Shift 1-Reg Hrs Work
36.	Click the **Task Profile Search** button to search for the Stream Survey (**FA00000013**).
37.	The most common search option for employees with multiple **Task Profiles** is to search by **Description**. By entering a keyword as the description, **Task Profiles** containing that keyword will be returned.

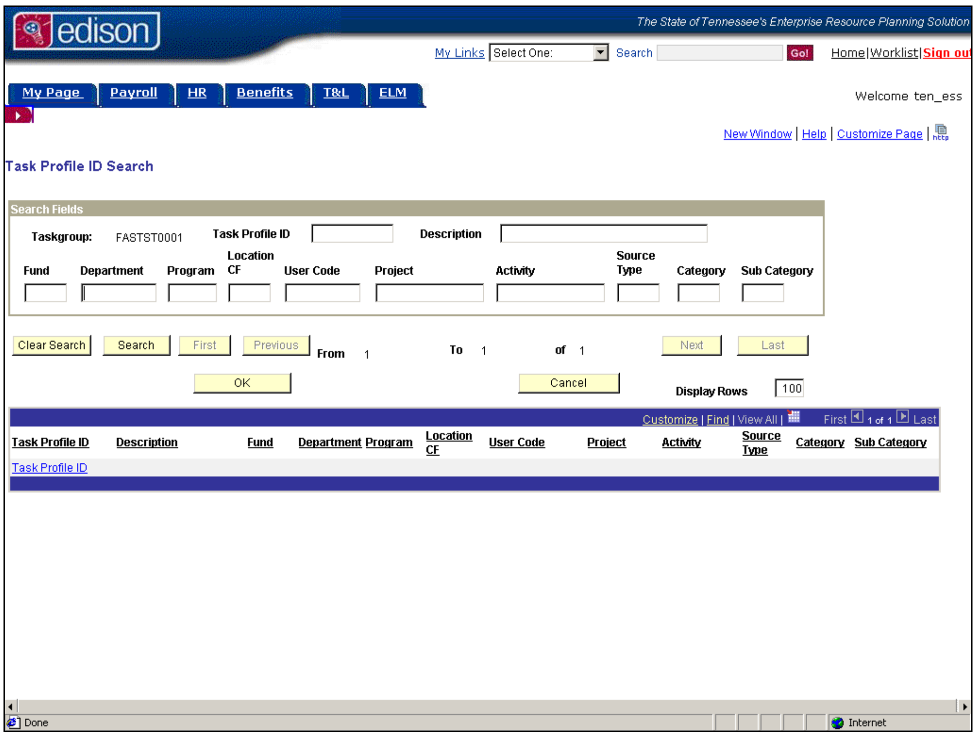


Step	Action
38.	Click in the **Description** field.
39.	The Description field will allow you to search using a partial description. Enter the desired information into the **Description** field. Enter "**stream**".
40.	Click the **Search** button. Search
41.	Click on the **FA00000013** entry in the **Task Profile ID** column. FA00000013
42.	If the results did not return the Task Profile you were searching for, you can use the **Clear Search** button and try again with a different **Description** or search on a different field.
43.	Click the **OK** button. OK



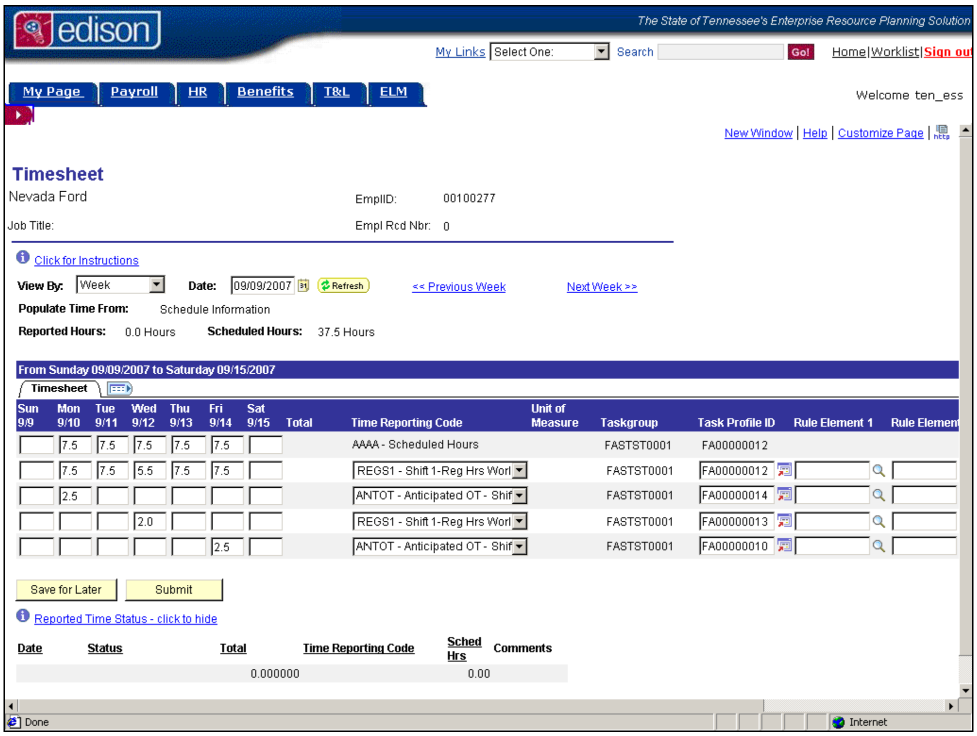
Step	Action
44.	Click the scrollbar.
45.	Click the **Add a new row** button.
46.	As you can see, there were no changes to Thursday, but on Friday the employee worked 2.5 hours of Anticipated Overtime (**ANTOT**) on the DARE Grant (**FA00000010**).
47.	Click in the **Fri 9/14** field on the newly created row.
48.	Enter the desired information into the field. Enter "**2.5**".
49.	Click the **Time Reporting Code** list.
50.	Edison calculates overtime according to the employee's FLSA time period. Therefore, the Anticipated Overtime TRC is selected to ensure the specific task (or Task Profile) that caused 2.5 hours of overtime will be charged the appropriate rate. Click the **ANTOT - Anticipated OT - Shift 1** list item. ANTOT - Anticipated OT - Shi

Step	Action
51.	Click the **Task Profile Search** button to search for DARE Grant (**FA00000010**). Click the **Task Profile Search** button. 
52.	All fields are searchable by entering only the first few digits of the value you are searching. The **Description** field can also be searched using keywords contained within the description.

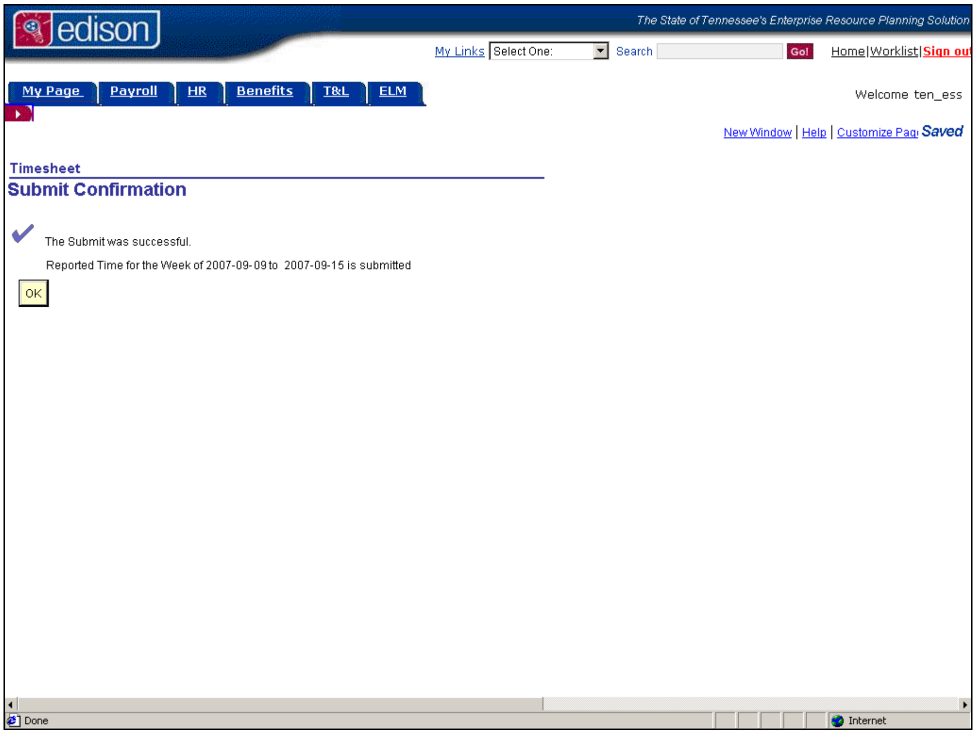


Step	Action
53.	We are going to perform our search by only entering the first few characters of the **Project**. Enter the desired information into the **Project** field. Enter "**FA08DARE**".
54.	Click the **Search** button. Search

Step	Action
55.	The results will return all Projects which begin with **FA08DARE**. In this case, only one was returned.
56.	Click on the **FA00000010** entry in the **Task Profile ID** column. FA00000010
57.	Click the **OK** button. OK



Step	Action
58.	Click the **Submit** button. Submit



Step	Action
59.	Click the **OK** button. 
60.	The time has been submitted and the payroll cost will be distributed as listed below: 35.5 Regular Hours (**REGS1**) to the Region 1 Administrative Office (**FA00000012**) 2.5 Anticipated Overtime (**ANTOT**) to the East TN Licensure (**FA00000014**) 2.0 Regular Hours (**REGS1**) to the Stream Survey (**FA00000013**) 2.5 Anticipated Overtime (**ANTOT**) to the DARE Grant (**FA00000010**)
61.	You have successfully entered **Task Profile IDs** and **Anticipated Overtime** on the timesheet. **End of Procedure.**

Changing Overtime Compensation Methods

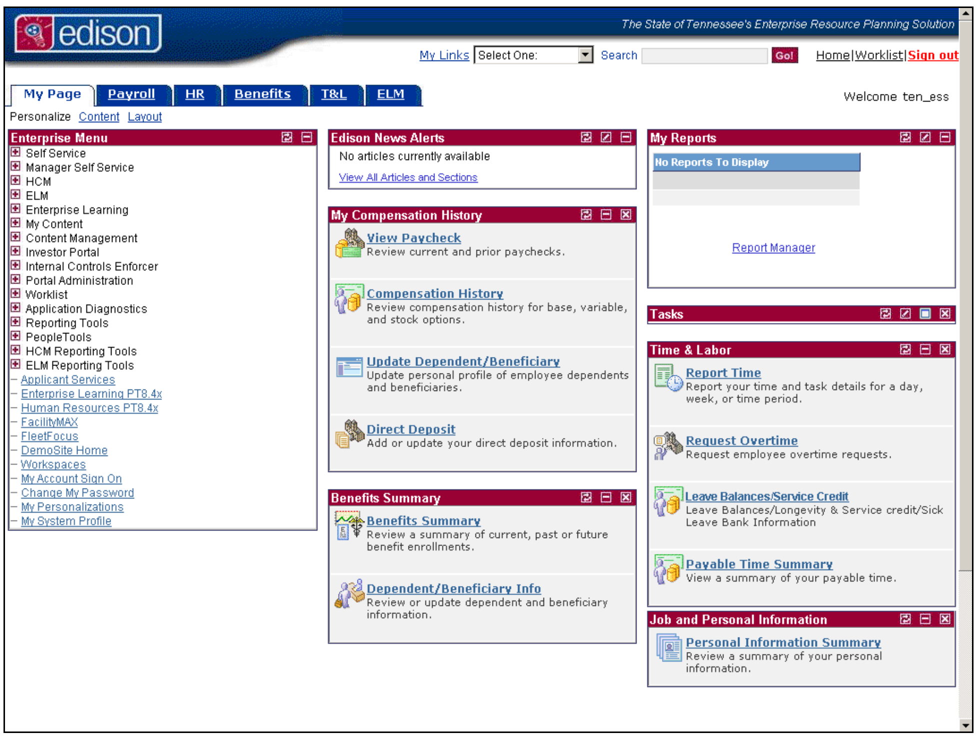
Reporting overtime on the timesheet is governed by Agency specific rules. When hired, some non-exempt employees can opt for either cash or compensatory time for their overtime. Once the choice is made, all overtime will be compensated in the manner chosen. Most exempt employees receive compensatory time for their overtime.

If you are an exempt or non-exempt employee whose compensation choice for overtime is set by agency specific rules, the system will default this information from your **Time Reporter Data,** so no entry is required on your timesheet. If you are a non-exempt employee with **TNCASH_COMP** on your **Time Reporter Data** page, you have the option to choose either **TNCASH** or **TNCOMP** in the **Rule Element 1** field on your timesheet to indicate whether you want cash or compensatory time for your overtime.

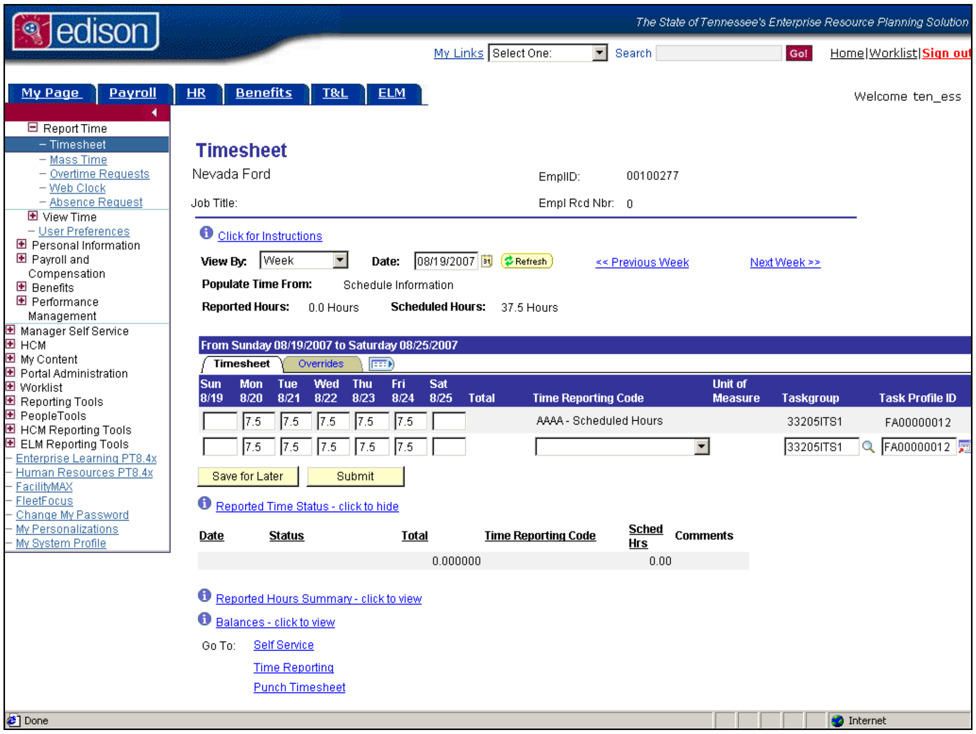
After the time you reported on your timesheet is processed and payable time is created, you can go to the payable time summary to review your overtime to ensure that it is correct.

Procedure

In this lesson, we will be changing the rule element fields on the timesheet which will only be available to certain employees.

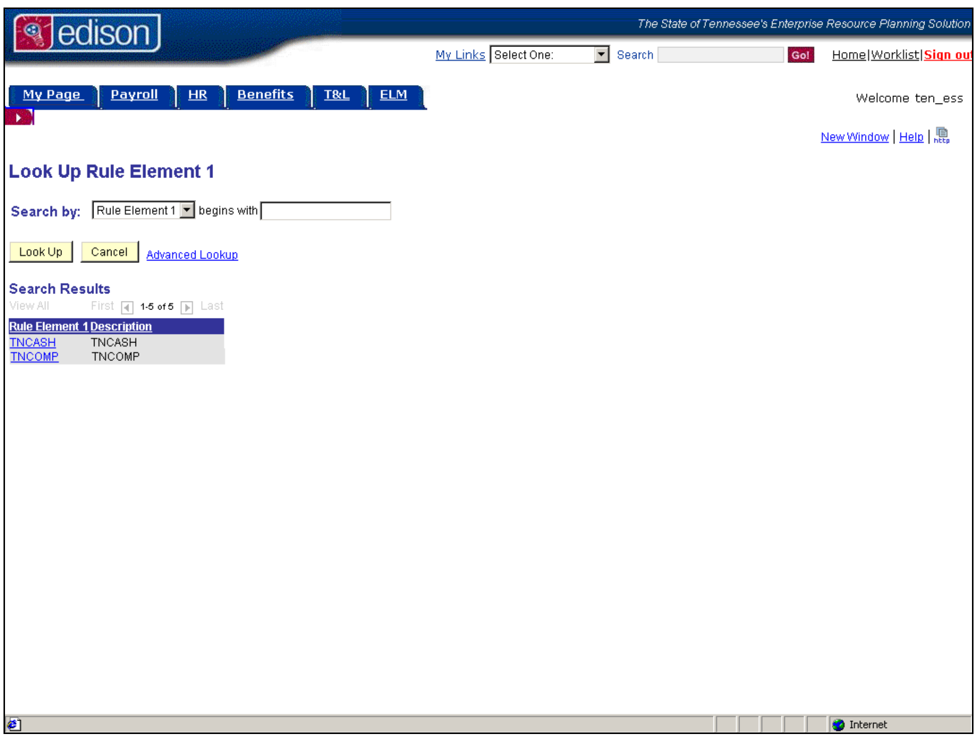


Step	Action
1.	Click the **Report Time** link. Report Time



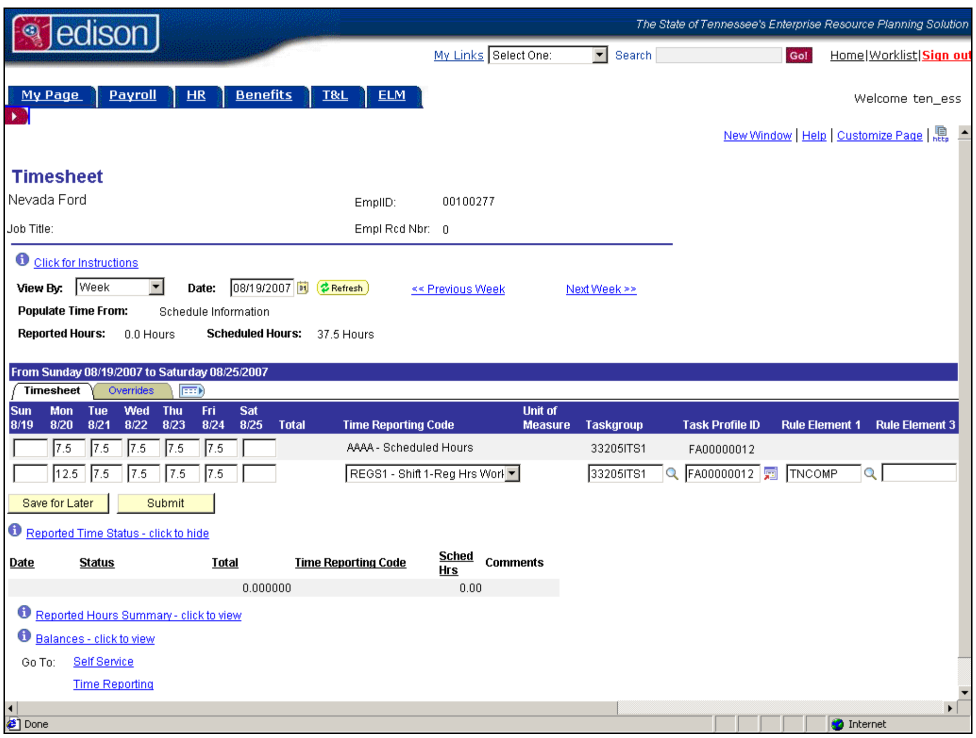
Step	Action
2.	To provide more room on the page, click the **Collapse** button. 
3.	In this example, you worked 12.5 hours on Monday and your normal scheduled hours the remainder of the week.
4.	Click in the **Mon 8/20** field. 
5.	Press **[Backspace]**.
6.	Enter the desired information into the **Mon 8/20** field. Enter "**12.5**".
7.	Click the **Time Reporting Code** list. 
8.	Use the scrollbar to find the appropriate TRC, or search for the appropriate TRC by entering the first letter of the TRC. In this example, the TRC "**REGS1-Shift1-Reg Hrs Worked**" will be used, therefore you enter the letter "**r**" into the **Time Reporting Code** field.
9.	Click the **TRC** code for regular hours, **REGS1 - Shift 1-Reg Hrs Worked** list item. 

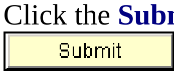
Step	Action
10.	Based on your agency's policy, non-exempt employees may have the option to change how they receive their overtime compensation (either cash or compensatory time). Non-exempt employees will receive cash overtime for hours worked in excess of their regular schedule unless manually changed to compensatory time.
11.	Click the **Rule Element 1** button.
12.	Remember, the default value is cash, so you do not need to select **TNCASH** unless you are changing from **TNCOMP**. Since you wish to earn comp time for your overtime, select the **TNCOMP** entry in the **Rule Element 1** column.

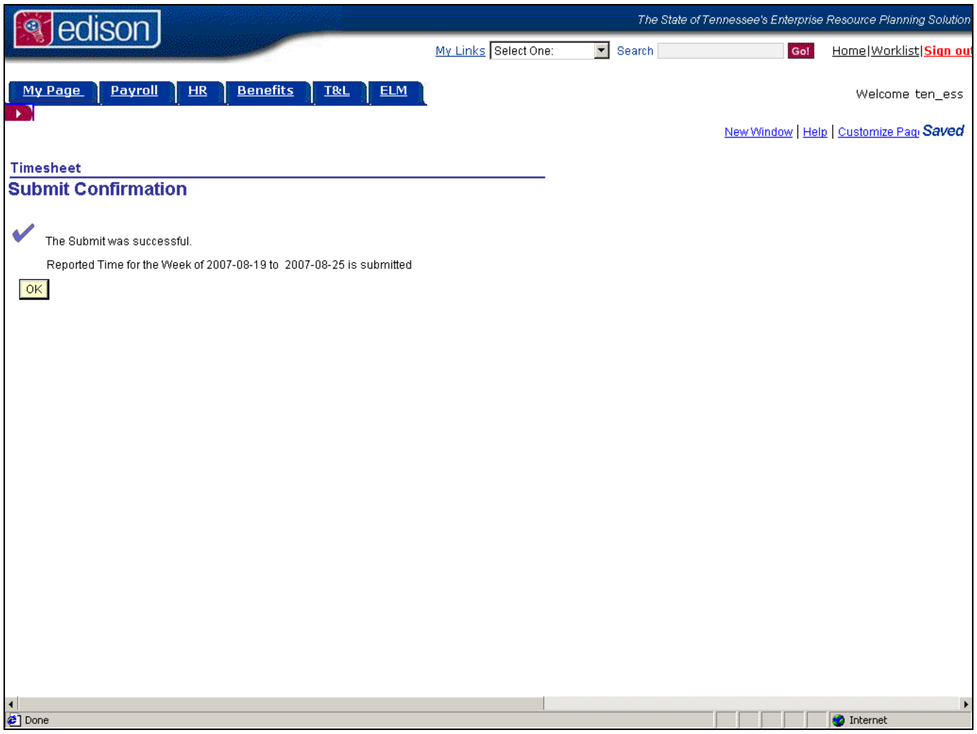


Step	Action
13.	Click the **TNCOMP** entry. TNCOMP
14.	This field should remain blank if you are not eligible to change your overtime compensation. If an ineligible employee selects either **TNCASH** or **TNCOMP** for **Rule Element 1**, an exception will generate when the Time Administration process runs. If the exception is not managed, you are at risk of not being paid correctly.

Step	Action
15.	The change will be effective for the current FLSA time period only. In order to change your default Rule Element, contact your Agency Time and Labor Administrator. For example, you would need to select **TNCOMP** again the following FLSA time period to receive comp overtime unless you notified your Agency Time and Labor Administrator. The Agency Time and Labor Administrator could have your default compensation value changed. In this example, after notifying the Agency Time and Labor Administrator, you would automatically receive compensatory time without having to manually select it from the **Rule Elements 1** field. Several agencies have policies regarding how often non-exempt employees are able to change their overtime compensation from cash to comp and vice versa.
16.	The **Rule Element 3** field is used for certain overtime situations. This field will only be used by the Agency Time and Labor Administrator.



Step	Action
17.	Click the **Submit** button. 



Step	Action
18.	Click the **OK** button. 
19.	You have successfully used the Rule Element to change the overtime compensation method from receiving cash to compensatory time. **End of Procedure.**

Report and Review Overtime in a Split Week

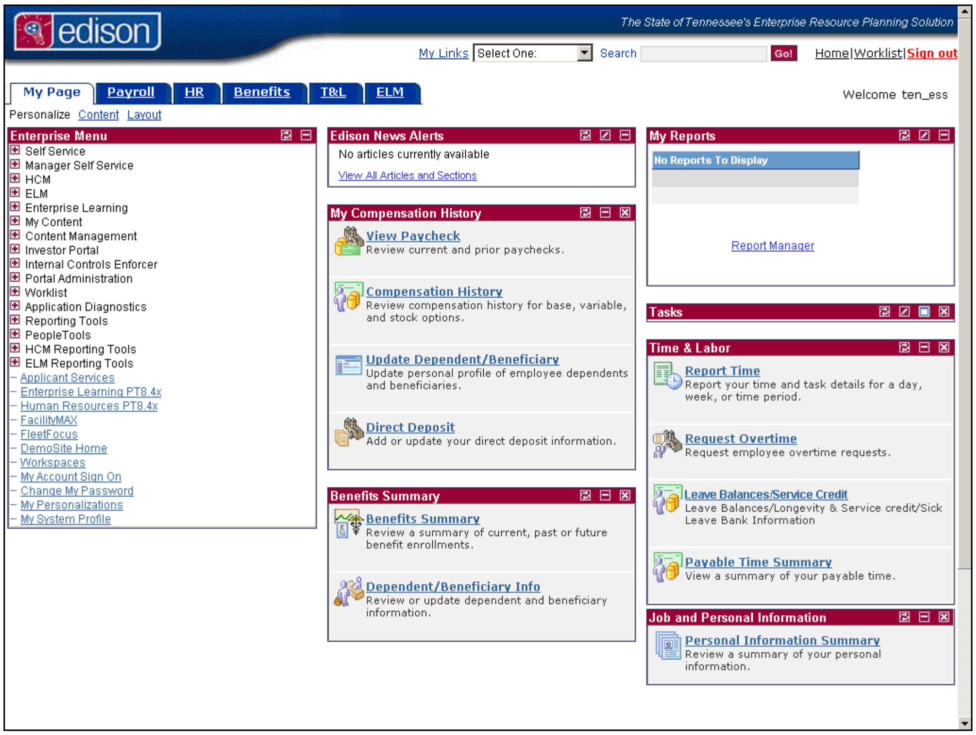
If time is worked in excess of regular scheduled hours during a split work week, the system will not process the overtime until after the FLSA time period is complete. This may cause **Unprocessed Overtime (UPOT)** or **Unprocessed Anticipated Overtime (UPAOT)** to be generated after **Time Administration** runs.

Once the FLSA time period is complete and after **Time Administration** runs again, the **UPOT** and **UPAOT** will convert to the corresponding overtime TRCs (**ROT, POT, ANTOT**, etc).

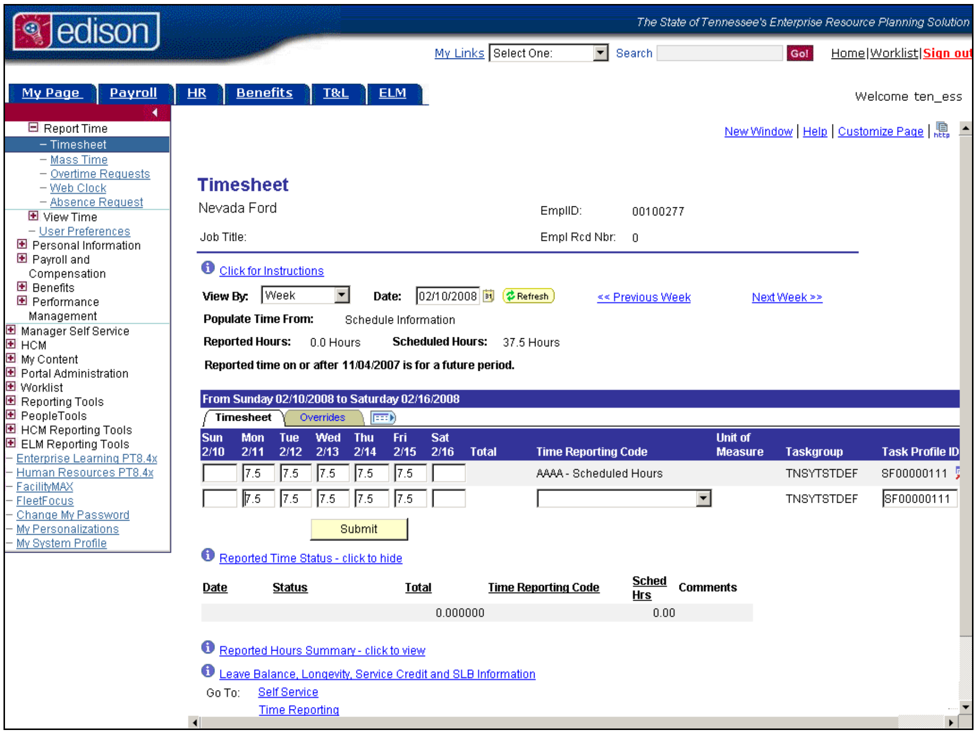
Just as the legacy system paid overtime in a split week, the unprocessed overtime will not be paid until the following pay cycle.

Procedure

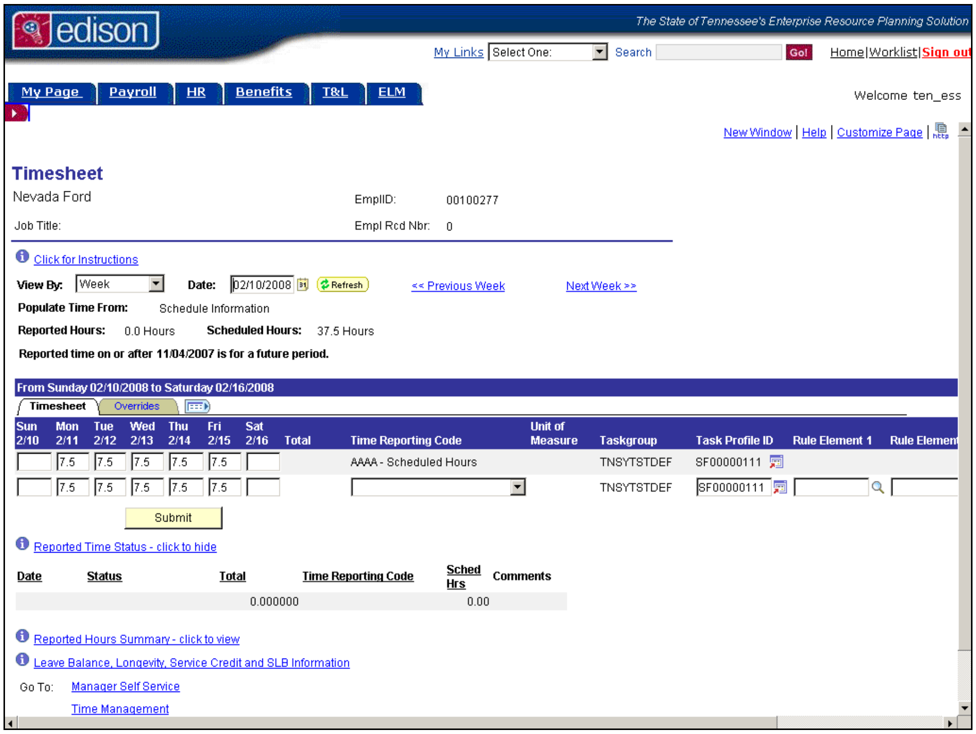
In this lesson we will review payable time generated by reporting overtime during a split workweek.



Step	Action
1.	Click the **Report Time** link. Report Time

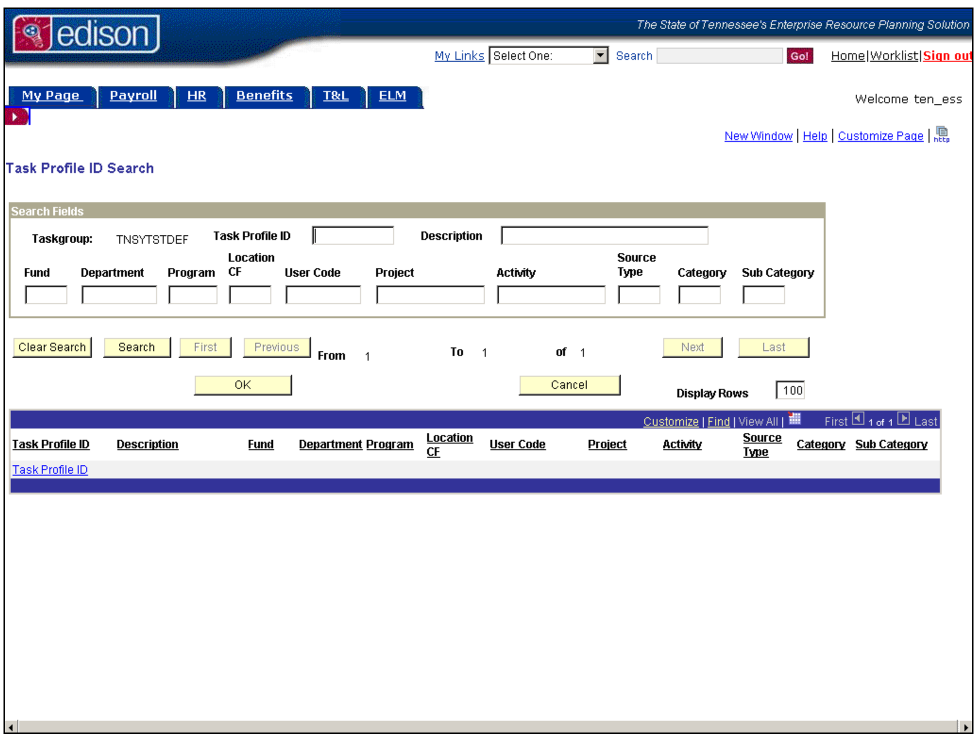


Step	Action
2.	Click the **Collapse** button. 
3.	Even though the pay period ends on **Fri 2/15**, the FLSA time period does not end until **Sat 2/16**.
4.	In this example, the generated schedule was worked, using the Regular Hours Worked (**REGS1**) TRC and the default Task Profile of **SF00000111** with the following exceptions: Monday - 9.0 Regular Hours Total worked on the default task profile (**SF00000111**). Tuesday - 2.0 Anticipated Overtime (**ANTOT**) hours worked on the HIGH VISIBILITY GRANT DRCT 4 (**SF00000264**).



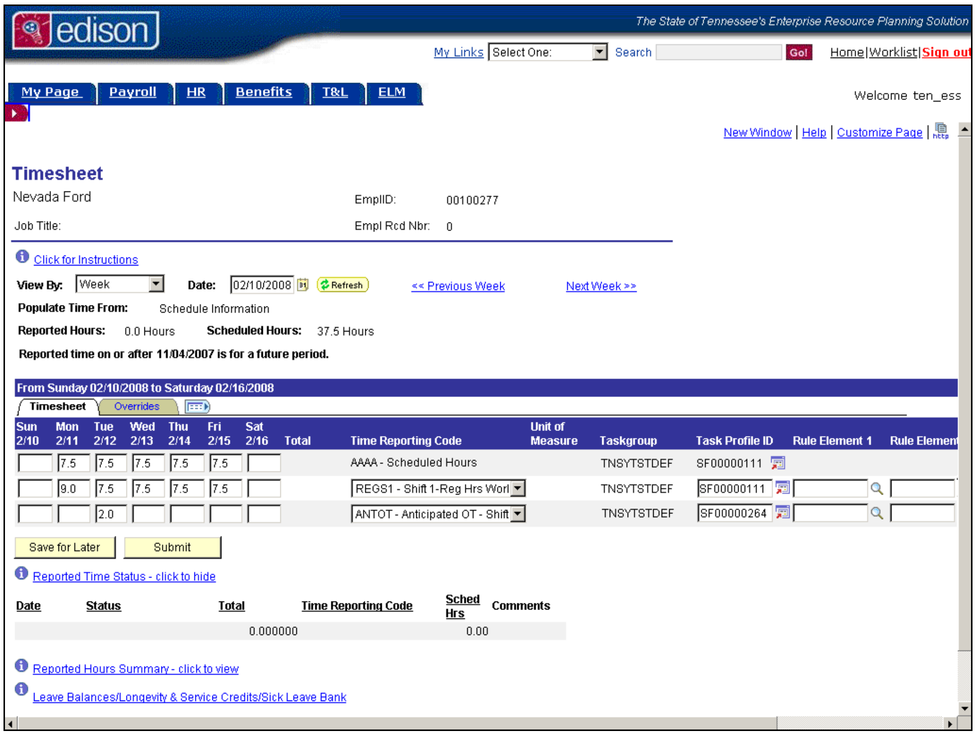
Step	Action
5.	Click in the **Mon 2/11** field. 
6.	Press **[Backspace]**.
7.	Enter the desired information into the **Mon 5/12** field. Enter "**9.0**".
8.	Click the **Time Reporting Code** list. 
9.	Use the scrollbar to find the appropriate TRC, or search for the appropriate TRC by entering the first letter of the TRC. In this example, the TRC "**REGS1-Shift1-Reg Hrs Worked**" will be used, therefore you enter the letter "**r**" into the **Time Reporting Code** field.
10.	Click the **REGS1 - Shift 1-Reg Hrs Worked** list item. 
11.	Click the scrollbar.
12.	Click the **Add a new row** button. 
13.	On **Tue 2/12**, Nevada worked 2.0 Anticipated Overtime (**ANTOT**) hours worked on the HIGH VISIBILITY GRANT DRCT 4 (**SF00000264**).

Step	Action
14.	Click in the **Tues 2/12** field.
15.	Enter the desired information into the **Tues 2/12** field. Enter "**2.0**".
16.	Click the **Time Reporting Code** list.
17.	Click the **ANTOT - Anticipated OT - Shift 1** list item. ANTOT - Anticipated OT - Shift
18.	The Task Profile default value needs to be changed. The appropriate **Task Profile ID** could be entered directly into the value field or it can be found using the **Task Profile Search** button.
19.	Click the **Task Profile Search** button.

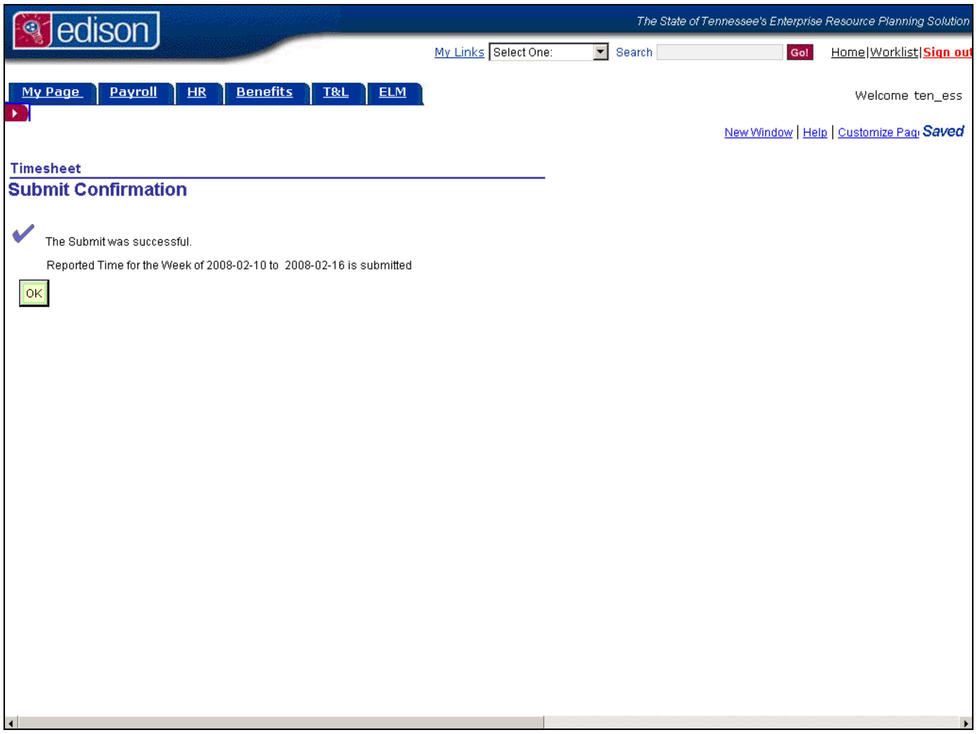


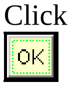
Step	Action
20.	We want the returned results to list all available **Task Profiles** for this employee. With all search fields blank, click the **Search** button. Search

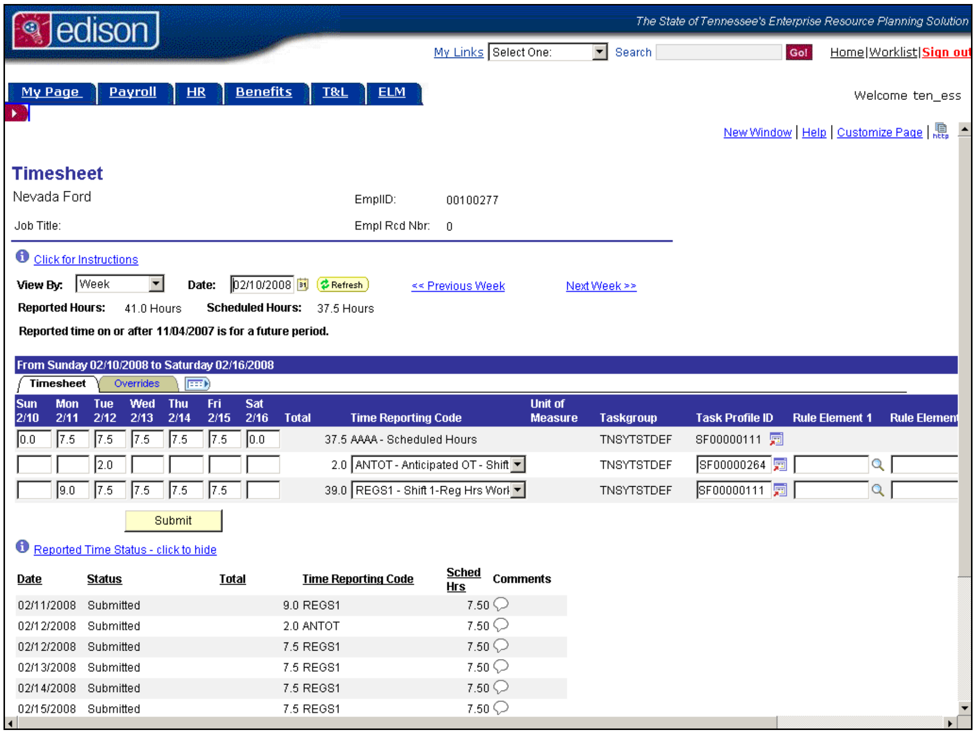
Step	Action
21.	Click an entry in the **Task Profile ID** column. SF00000264
22.	Click the **OK** button. OK



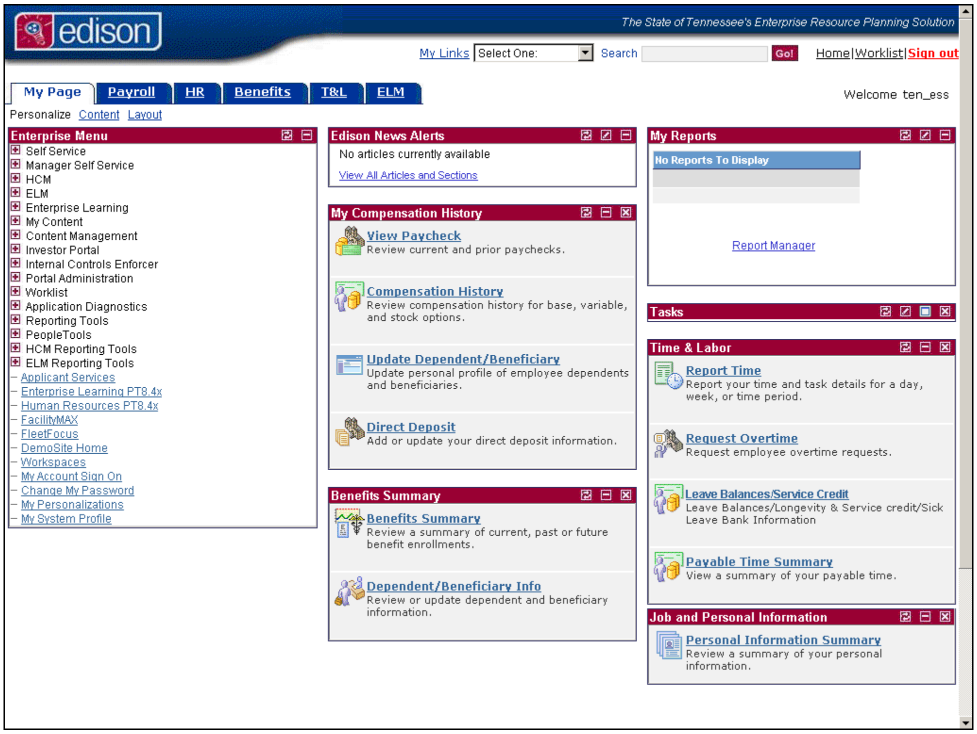
Step	Action
23.	Click the **Submit** button. Submit



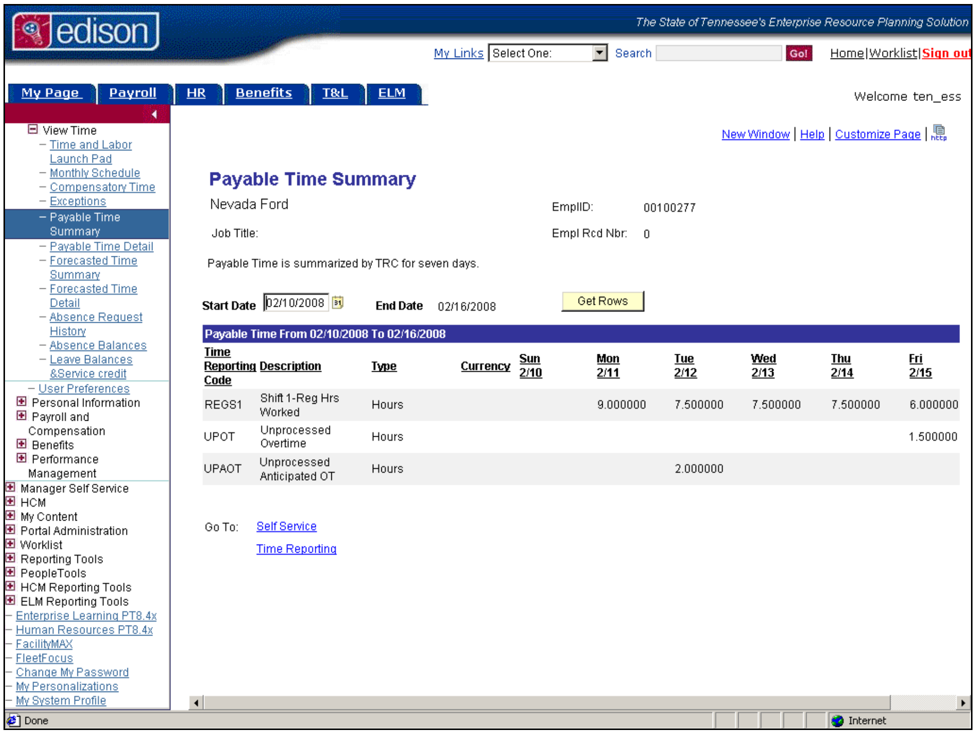
Step	Action
24.	Click the **OK** button. 
25.	At this point, **Time Administration** has run, so we can go look at the payable time.



Step	Action
26.	Click the **My Page** tab. 



Step	Action
27.	Click the **Payable Time Summary** link. Payable Time Summary



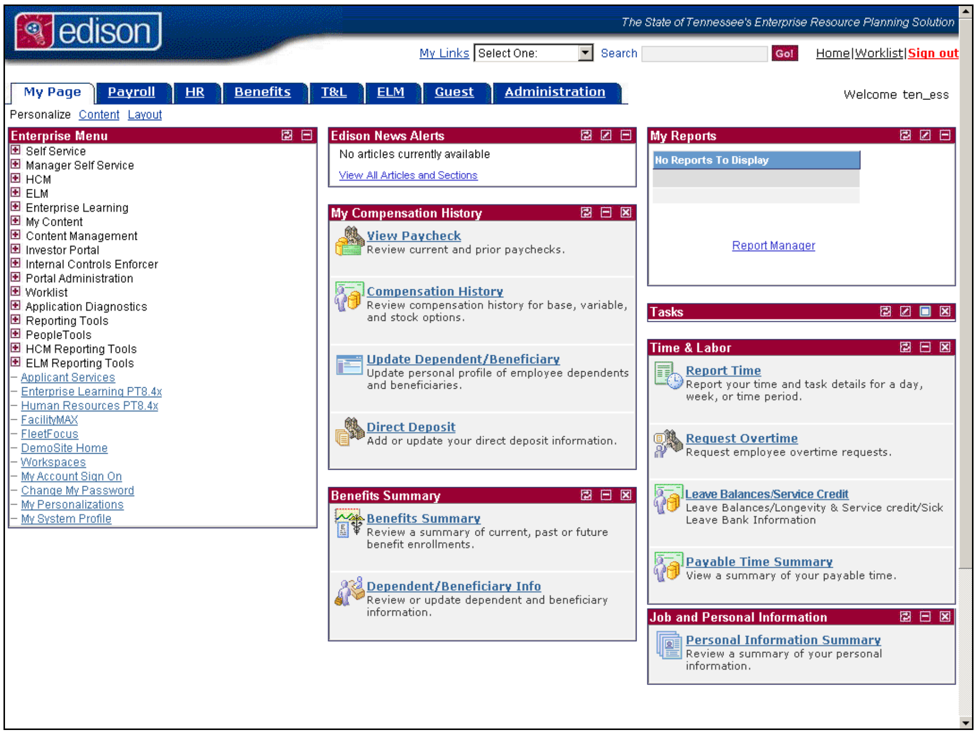
Step	Action
28.	Click the **Collapse** button. 
29.	The time worked in excess of the regular schedule on **Mon 2/11**, created overtime on **Fri 2/15** (the point where Nevada exceeded 37.5 hours). Since this is a split workweek, the overtime is coded as **Unprocessed Overtime (UPOT).**
30.	**Time Administration** caused the **Anticipated Overtime (ANTOT)** reported on the timesheet to change to **Unprocessed Anticipated Overtime (UPAOT)**.
31.	Once the FLSA time period is complete and after **Time Administration** runs again, the **UPOT** and **UPAOT** will convert to the corresponding overtime TRCs (**ROT, POT, ANTOT**, etc).
32.	You have successfully reported and reviewed overtime in a split week. **End of Procedure.**

Automatic Rescheduling

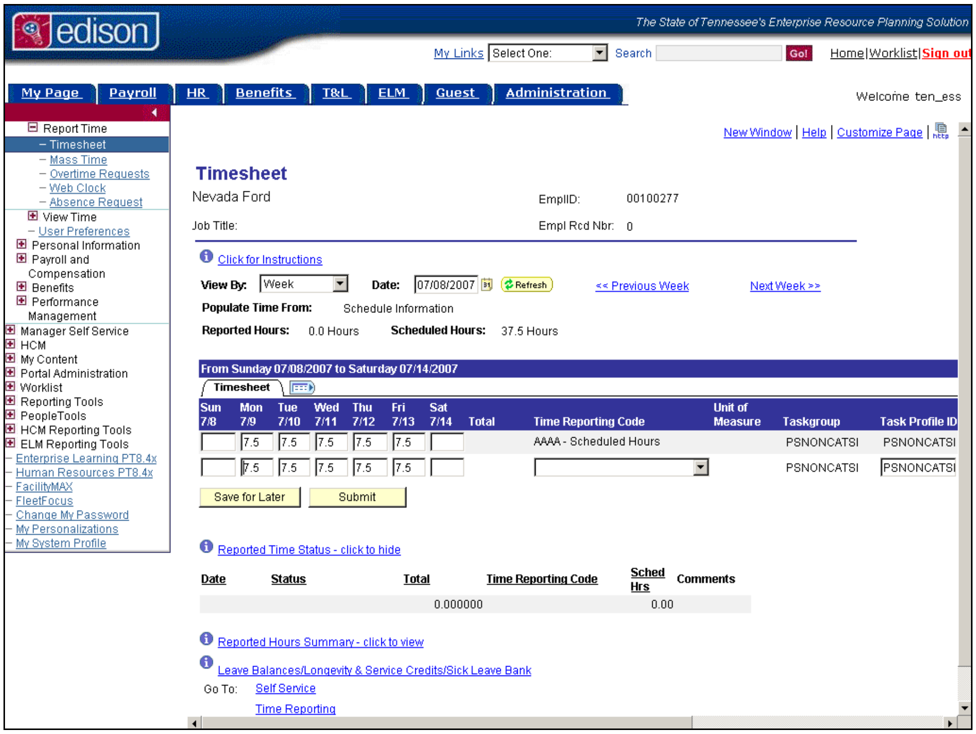
Overtime is calculated based on the number of hours worked in a FLSA time period. If an employee reports hours in excess of their regularly scheduled hours and reports certain types of leave in the same FLSA time period, the amount of leave taken will be rescheduled due to the hours reported in excess of their regularly scheduled hours. This requires the employee to use less leave.

Procedure

In this lesson, we will view how the system automatically reschedules payable time based on the type of reported time for Nevada Ford.

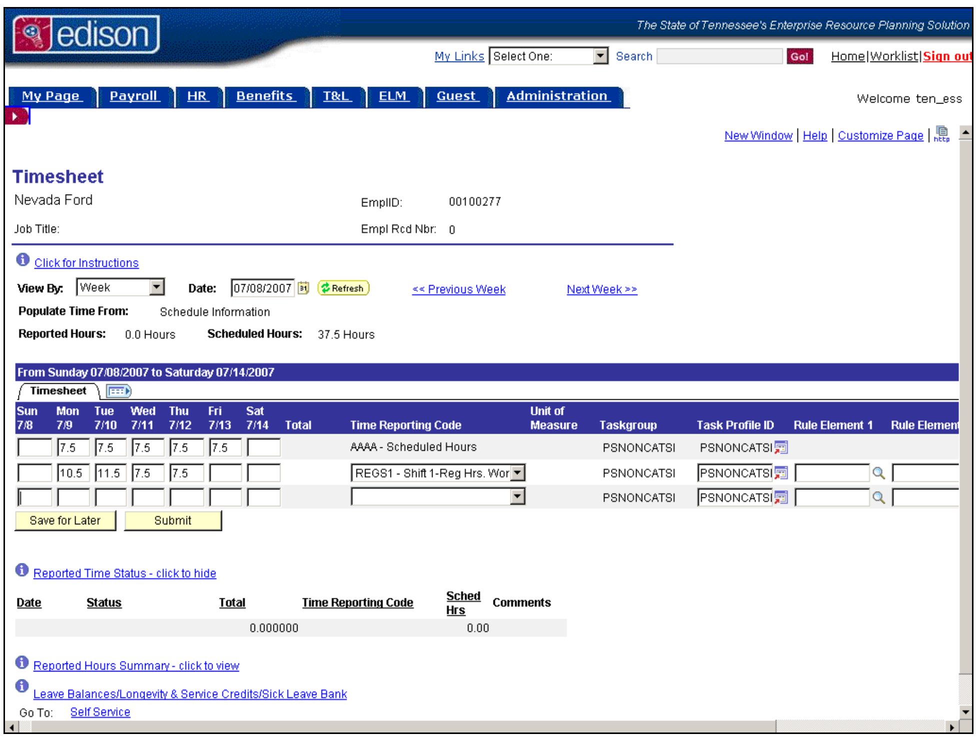


Step	Action
1.	Click the **Report Time** link. Report Time

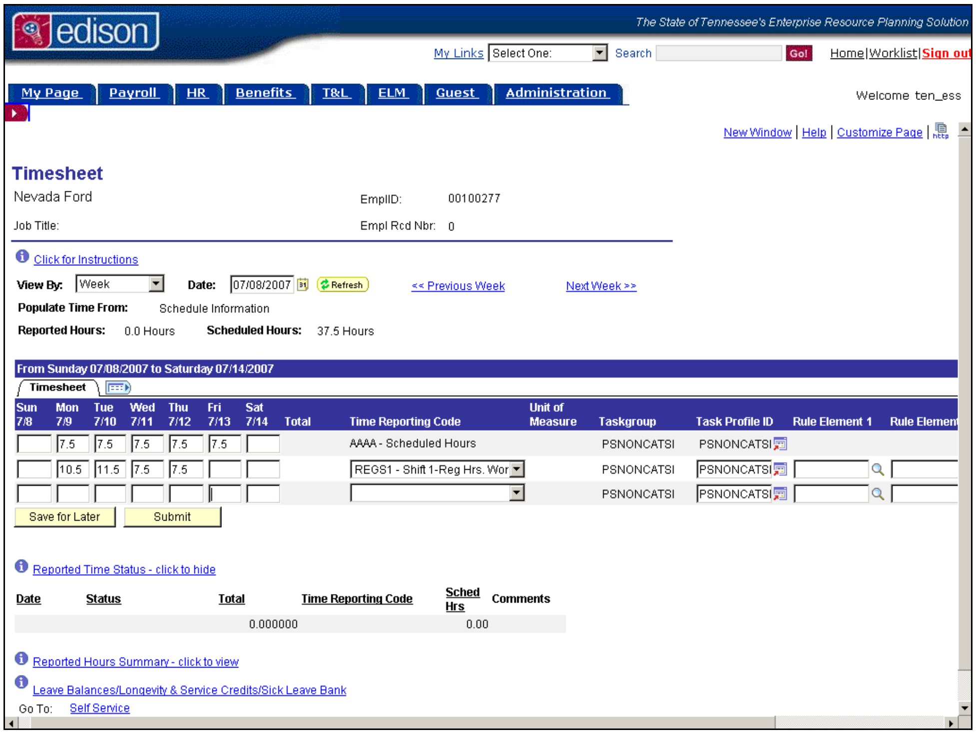


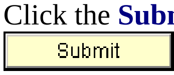
Step	Action
2.	Click the **Collapse** button. 
3.	The employee worked time in excess of her regularly scheduled hours on Monday (10.5 hours total) and Tuesday (11.5 hours total), but took annual leave on Friday. Assuming the overtime request was completed, we need to adjust the reported time on the timesheet.
4.	Click in the **Mon 7/9** field. 
5.	Enter the desired information into the **Mon 7/9** field. Enter "**10.5**".
6.	Click in the **Tue 7/10** field. 
7.	Enter the desired information into the **Tue 7/10** field. Enter "**11.5**".
8.	Click in the **Fri 7/13** field. 
9.	Press **[Backspace]** to delete the hours reported for the day.
10.	Click the **Time Reporting Code** list. 

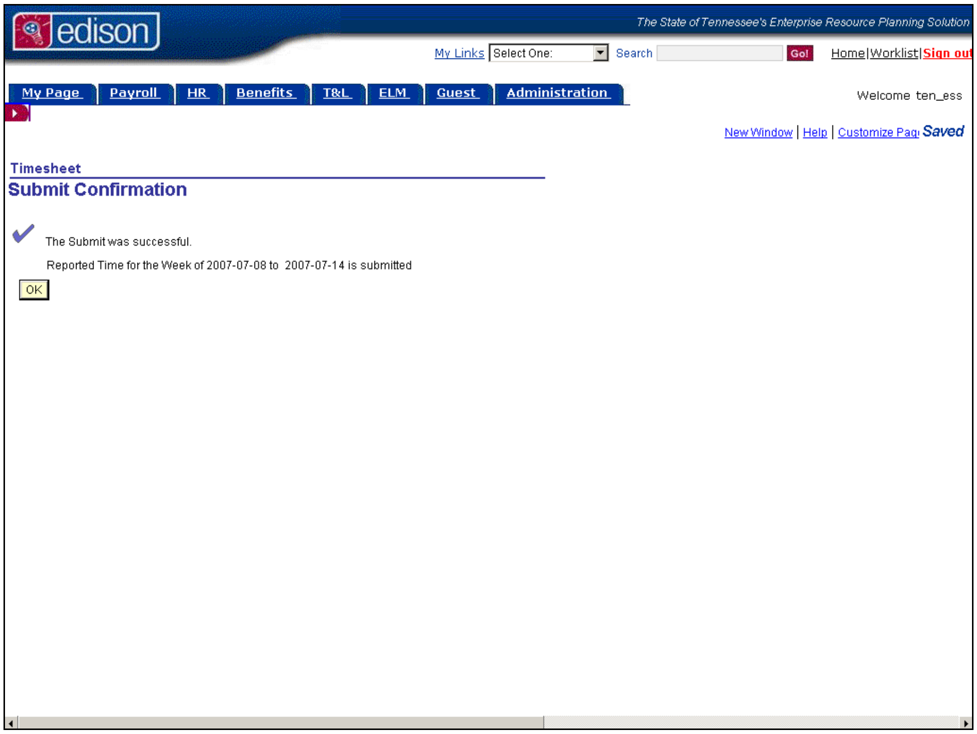
Step	Action
11.	Find the desired information from the **Time Reporting Code** list. To quickly navigate to a letter of the alphabet, enter that letter. To navigate to REGS1 (Regular Hours Worked - 1st Shift), enter "**r**."
12.	Click the **REGS1 - Shift 1-Reg Hrs. Worked** list item. REGS1 - Shift 1-Reg Hrs. Work
13.	Click the scrollbar.
14.	Click the **Add a new row** button to add a new row to report the annual leave.



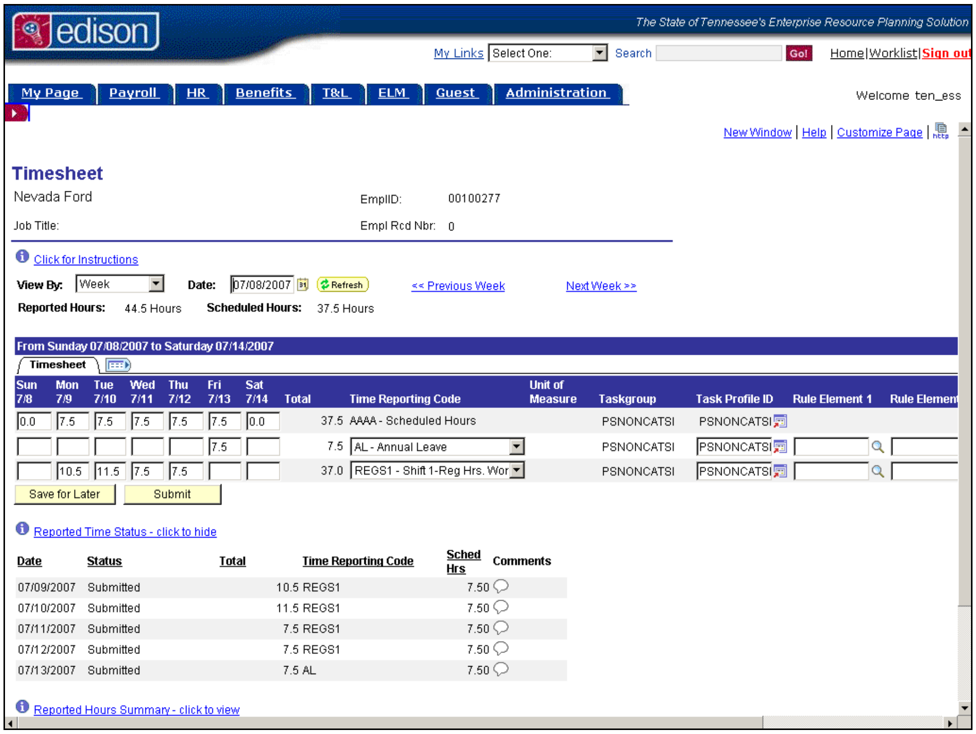
Step	Action
15.	Click in the **Fri 7/13** field.



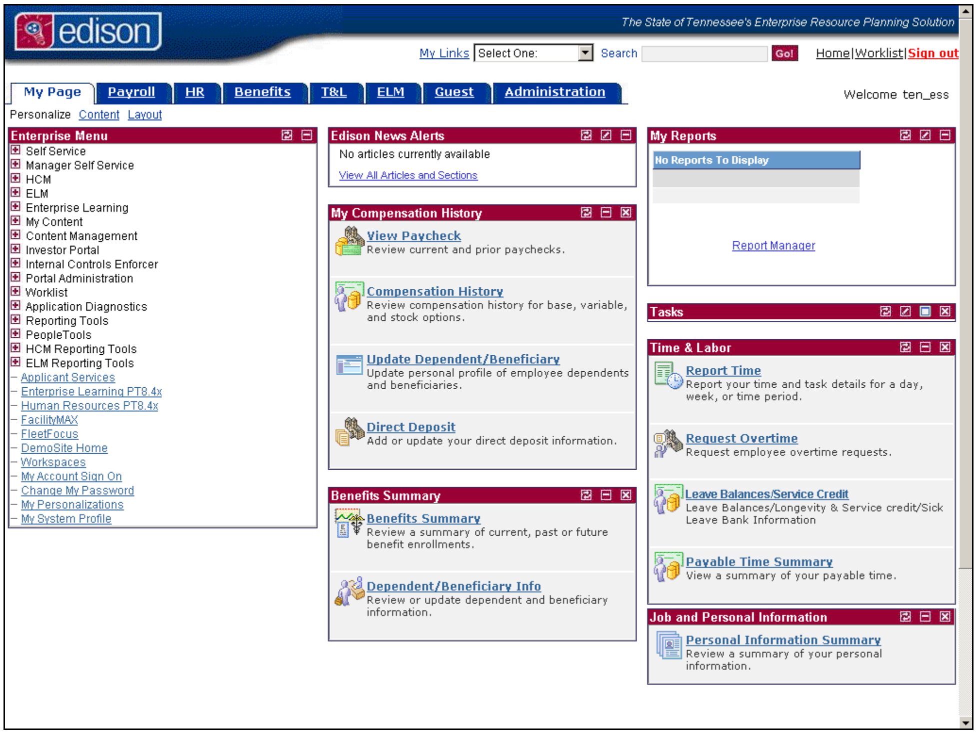
Step	Action
16.	Enter the desired information into the **Fri 7/13** field. Enter "**7.5**".
17.	Click the **Time Reporting Code** list. 
18.	Click the scrollbar.
19.	Click the **AL - Annual Leave** list item. 
20.	Click the **Submit** button. 



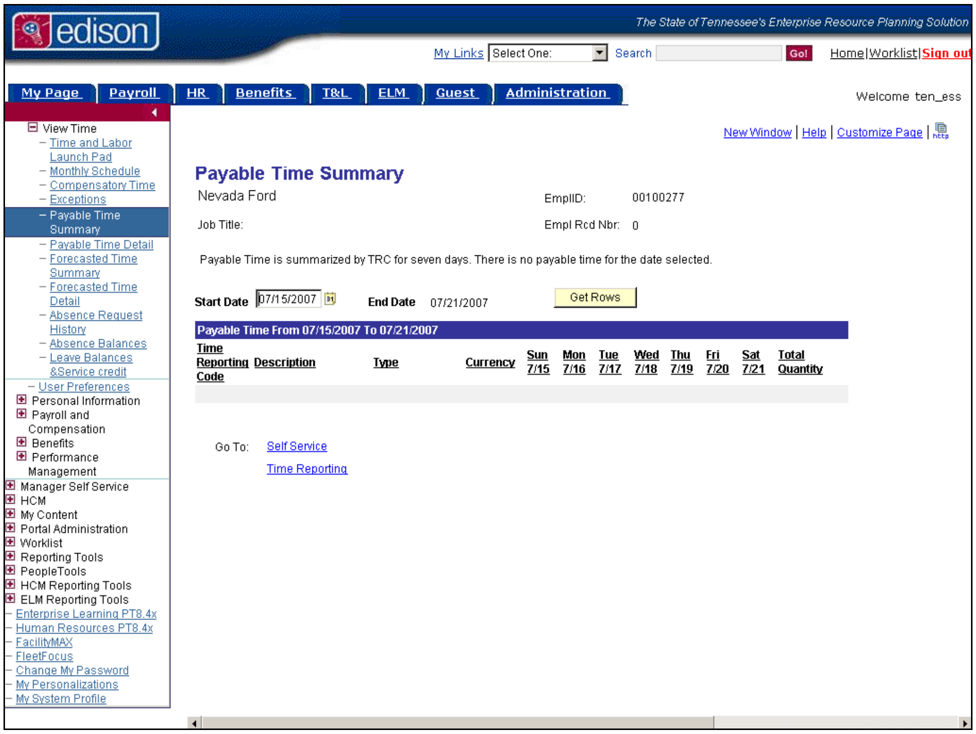
Step	Action
21.	Click the **OK** button. OK
22.	After submitting the time, the status changes to **Submitted**, and we have to wait for Time Administration to run before the supervisor can approve the time. Remember, Time Administration is the batch process that will run against the rules to verify timesheet accuracy and eligibility. This process is scheduled to run nightly. At this point, Time Administration has run, so we can go look at the payable time.



Step	Action
23.	Click the **My Page** link. My Page



Step	Action
24.	Click the **Payable Time Summary** link. Payable Time Summary



Step	Action
25.	Click the **Collapse** button.
26.	Click the **Choose a date** button.
27.	Click the **8** link. 8
28.	Click the **Get Rows** button. Get Rows
29.	On the **Payable Time Summary** screen, notice the system automatically rescheduled the employee's time. Since the employee worked excess hours on Monday and Tuesday but did not exceed the standard scheduled hours for the FLSA time period, the annual leave hours were reduced to 0.5 hours even though she was off the entire day.

Step	Action
30.	The following TRCs will be rescheduled: **TRC Description** AAL - Anticipated Accrued Annual Leave AL - Annual Leave ALWO - Annual Leave Without ASL - Anticipated Accrued Sick Leave CL - Compensatory Leave EDU - Education Lv With Pay EDUWO - Education Leave Without EXTWO - Extended Leave Without LWOP - Current Without Pay MILWO - Military Leave Without SCLWO - Seasonal Closure SEPWO - Separation Without SL - Sick Leave SLWO - Sick Leave Without TERAL - Terminal Leave - Annual TERCL - Terminal Comp Leave
31.	Sick Leave will not be rescheduled if a doctor's note is provided to your supervisor and if you use the **SLOVR - Sick Leave Override** TRC.
32.	You have successfully viewed the system automatically rescheduling reported time. **End of Procedure.**

My Benefits

Health Care Summary - Review

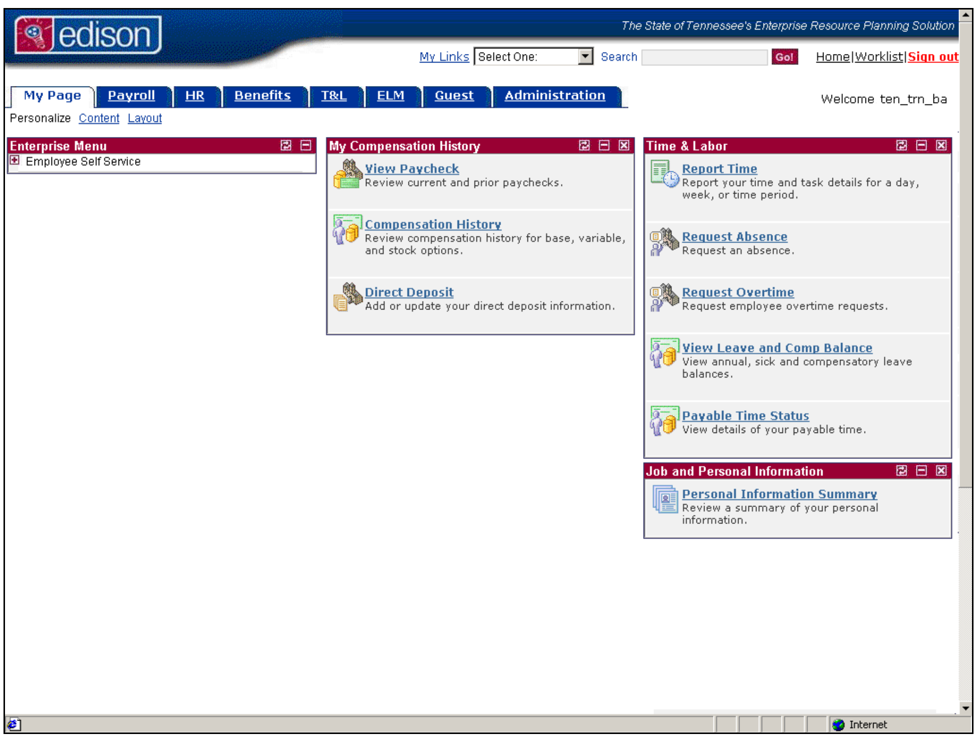
Edison allows employees to review their Health Plan Coverage using Self Service.

Health Care Summary provides the details for different types of benefits, such as Medical or Dental.

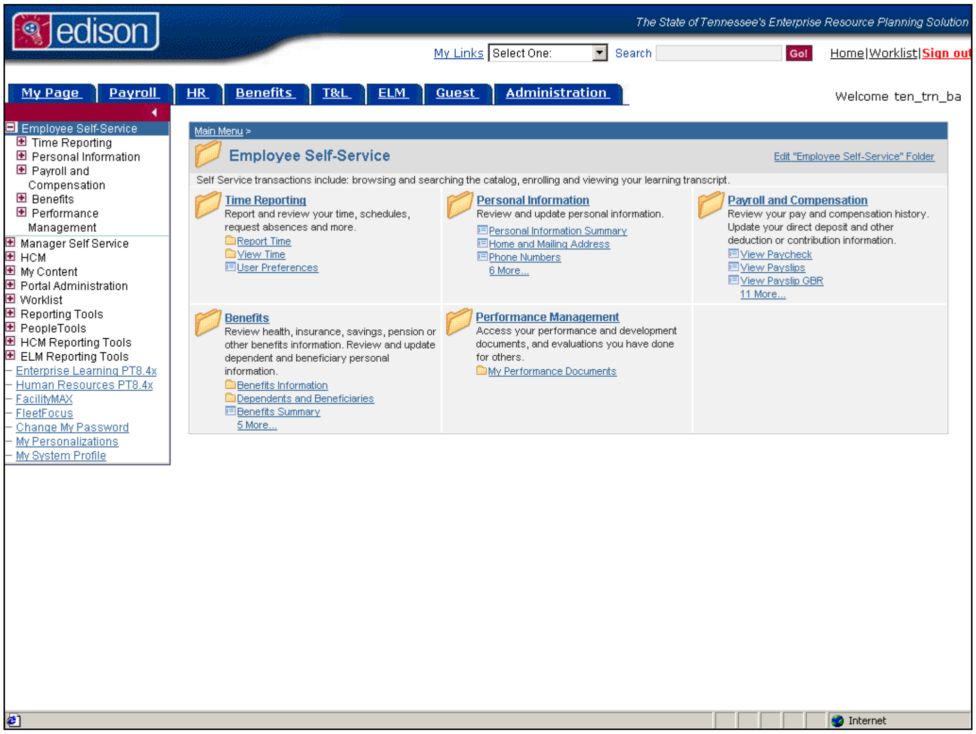
Procedure

In this lesson, you will learn to review your **Health Care Summary** information.

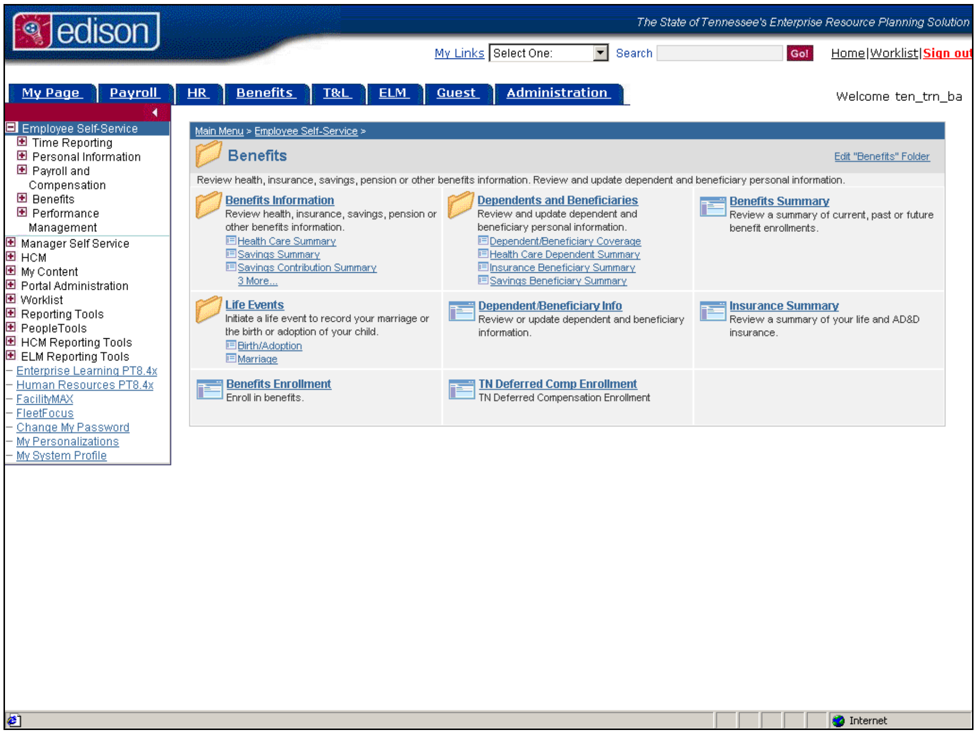
Steve Addams will be used as an example in this lesson.



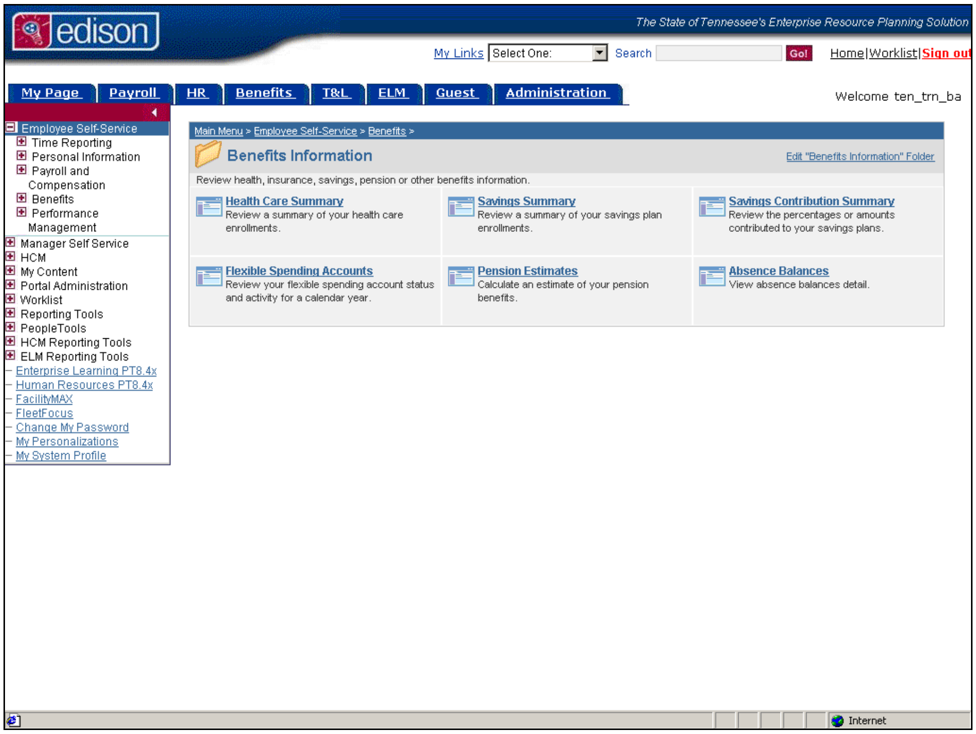
Step	Action
1.	Begin by clicking the **Employee Self Service** link. Employee Self Service



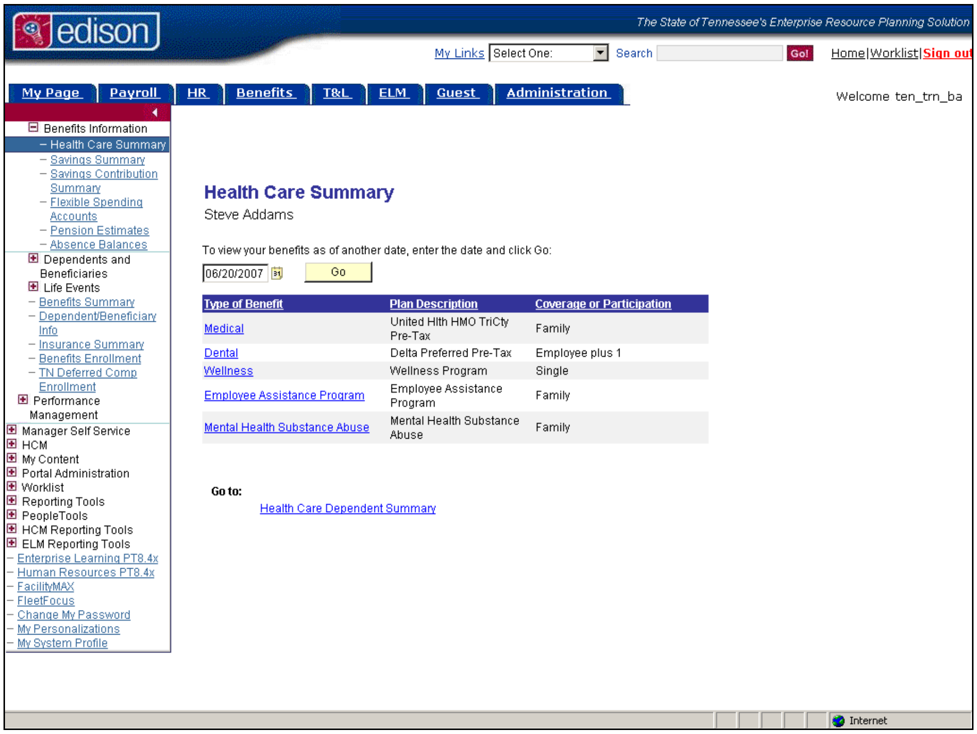
Step	Action
2.	Click the **Benefits** link. Benefits



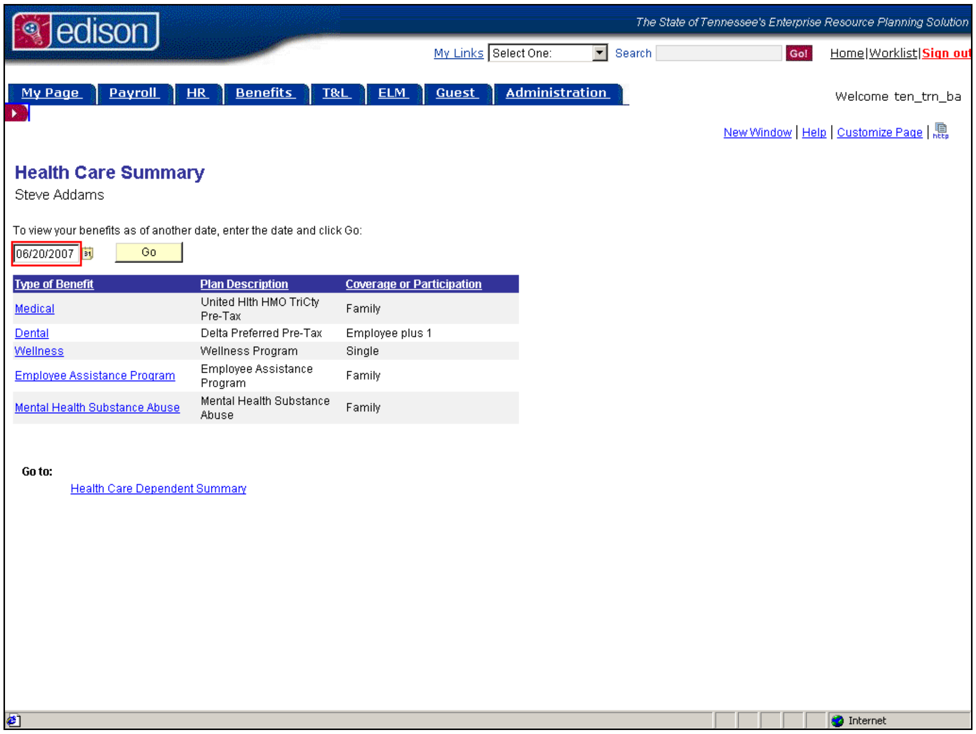
Step	Action
3.	Click the **Benefits Information** link. Benefits Information



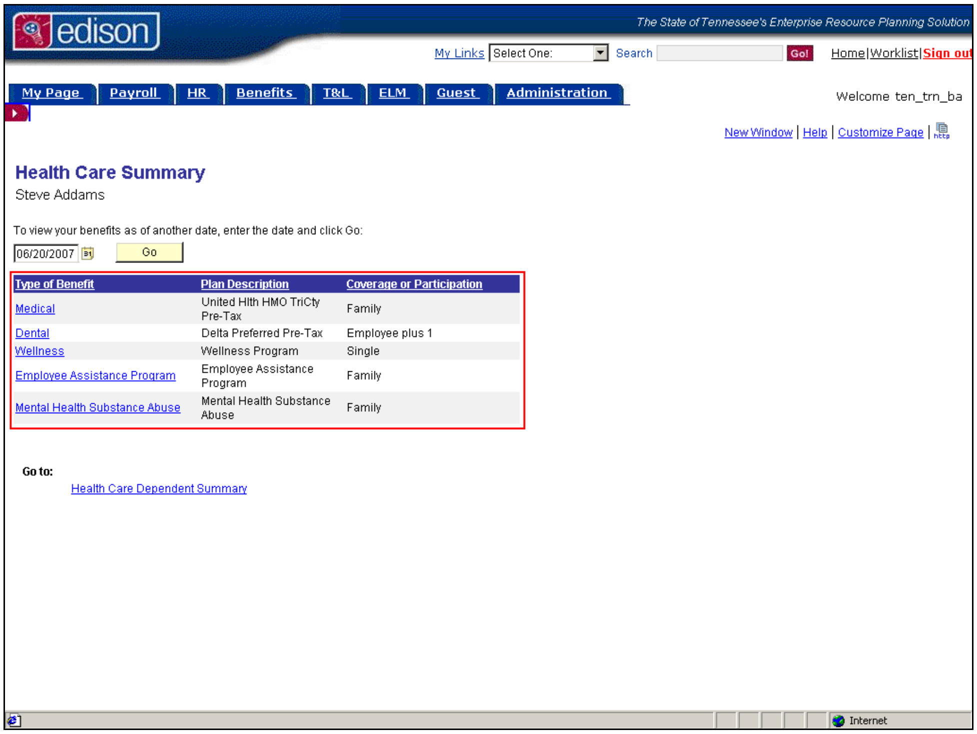
Step	Action
4.	Click the **Health Care Summary** link. Health Care Summary



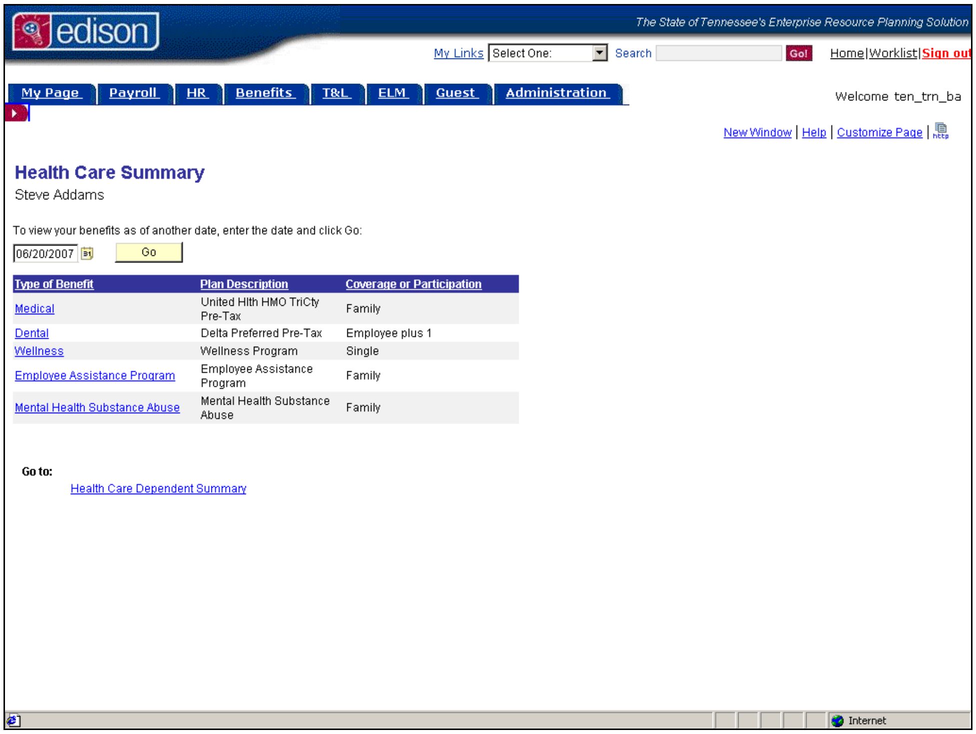
Step	Action
5.	Click the **Collapse** button. 



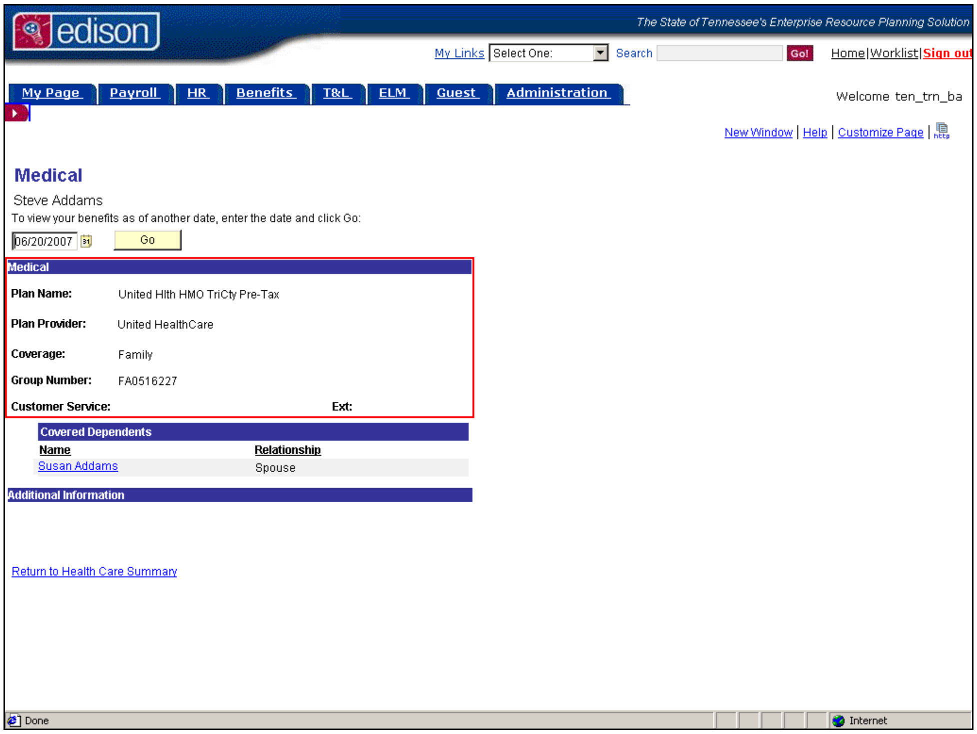
Step	Action
6.	**Edison** will default this date to the **Current Date**. If you want to view the details of the **Health Care Summary** for another date, enter the appropriate date and click **Go.** For this example, we will leave the default date.



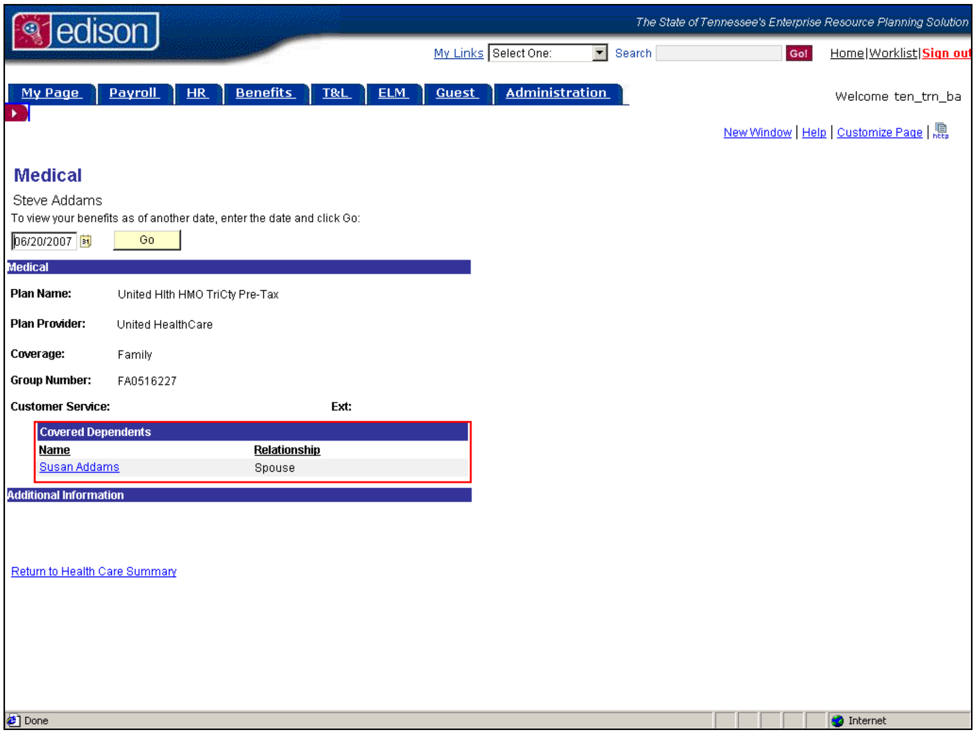
Step	Action
7.	This section details the **Type of Benefit**, **Plan Description** and **Coverage**. **Type of Benefit** refers to different types of health benefits available to an employee, such as medical or dental. **Plan Description** gives a more detailed description of the plan. **Coverage or Participation** depends upon the health care requirements of the individual. Some types include Individual and Family.



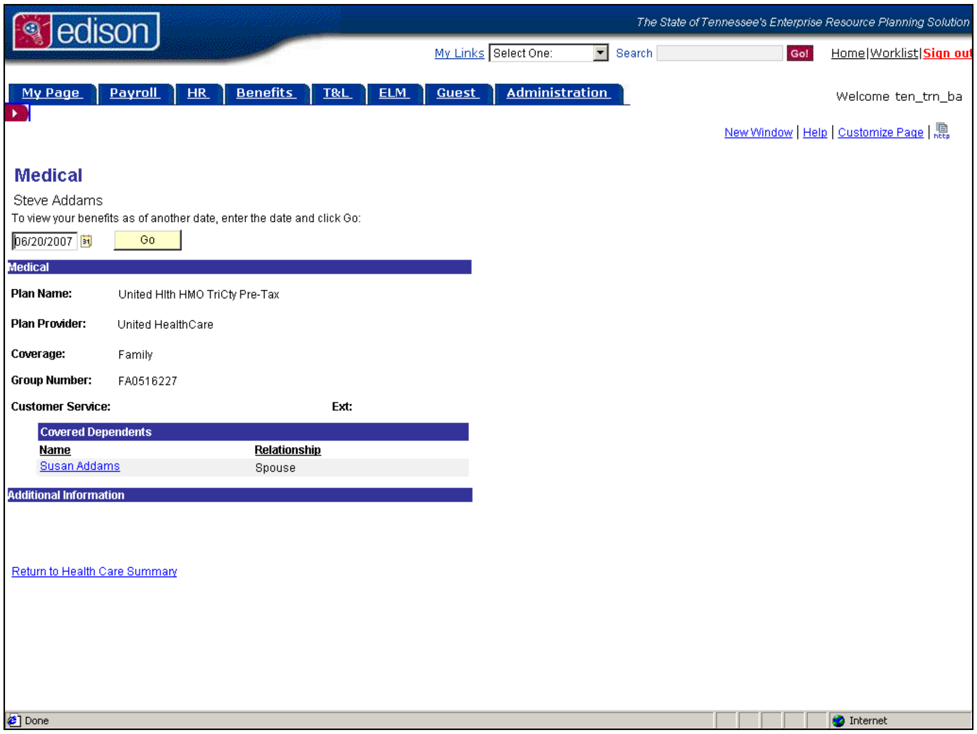
Step	Action
8.	Click on the **Medical** link in the **Type of Benefit** column to see the details for the Medical Plan Benefit. Medical



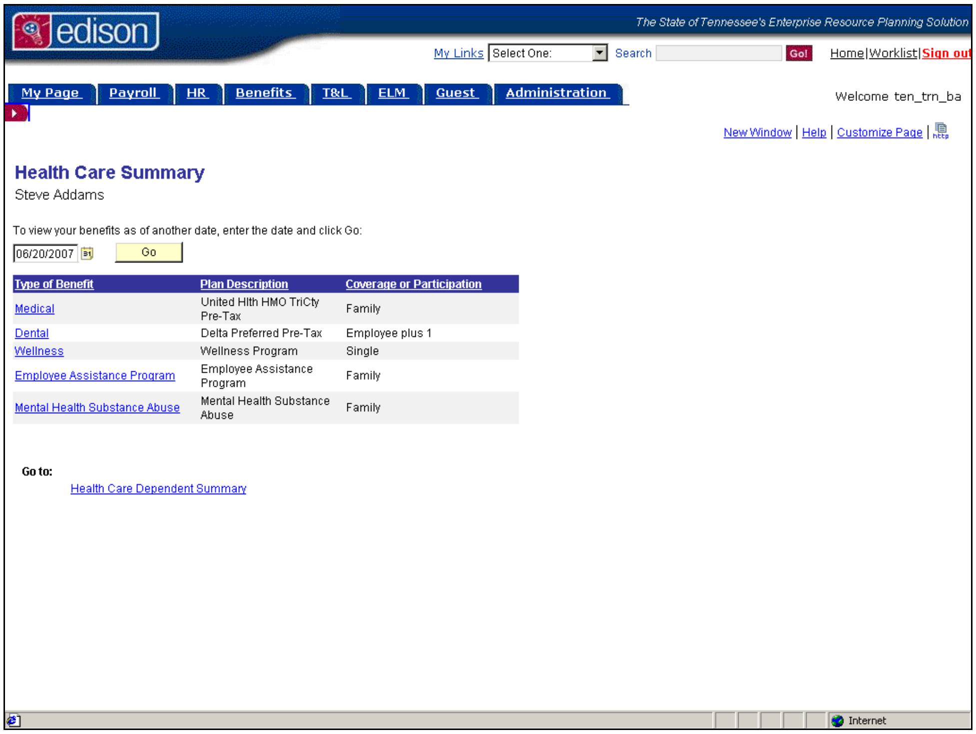
Step	Action
9.	The specific details of Steve's medical plan are outlined below.



Step	Action
10.	The **Covered Dependents** section lists the employee's dependents and their relationship to the employee.



Step	Action
11.	Click the **Return to Health Care Summary** link. Return to Health Care Summary
12.	To review details for the other listed benefit types (i.e., **Dental**, **Wellness**, etc..) you would click on the appropriate links.



Step	Action
13.	You have successfully completed reviewing your **Health Care Summary** information. **End of Procedure.**

Health Care Dependent Summary - Review

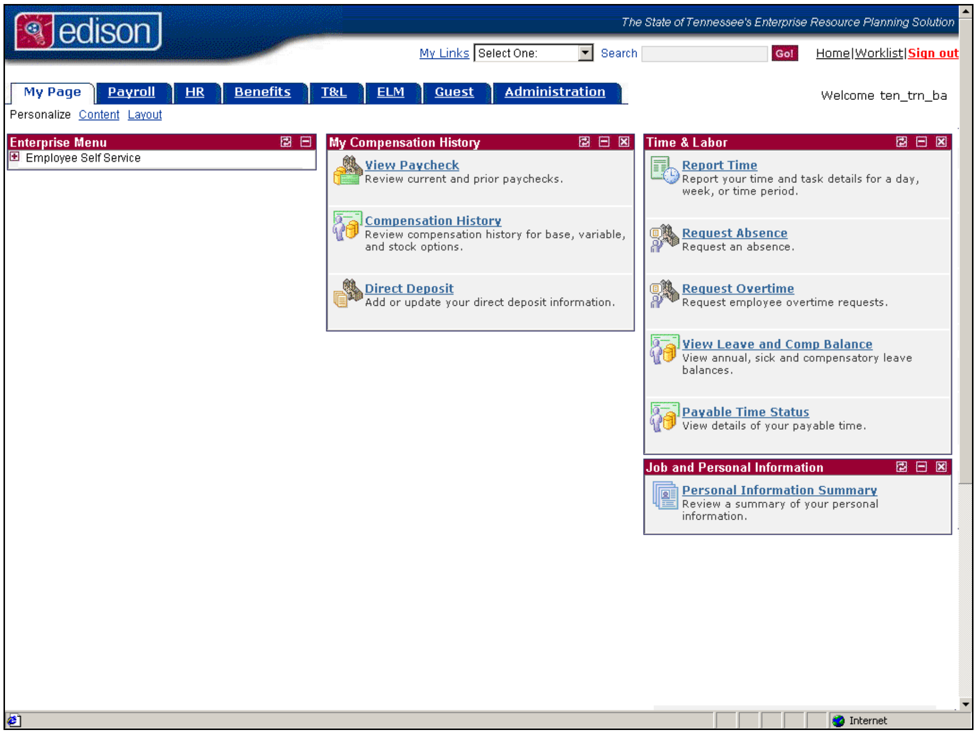
Edison allows employees to review their **Health Care Dependent Summary** using Self Service.

Health Care Dependent Summary provides details about your dependent's Health Care Benefit plan as of the current date or any previous date.

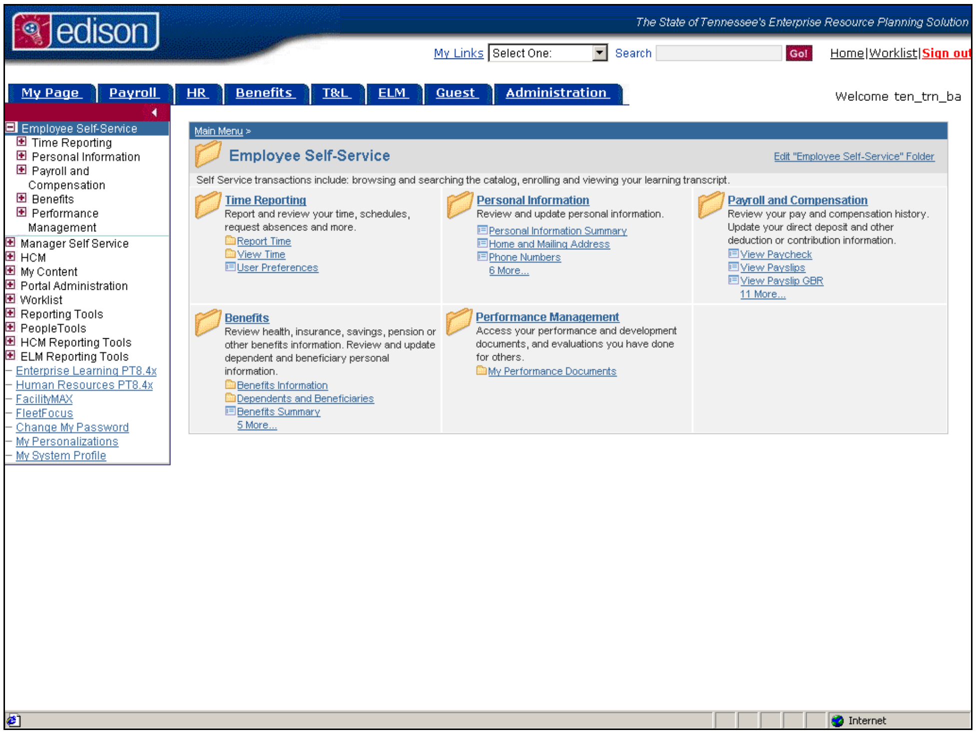
Procedure

In this lesson, we will learn how to review the **Health Care Dependent Summary** for your dependent.

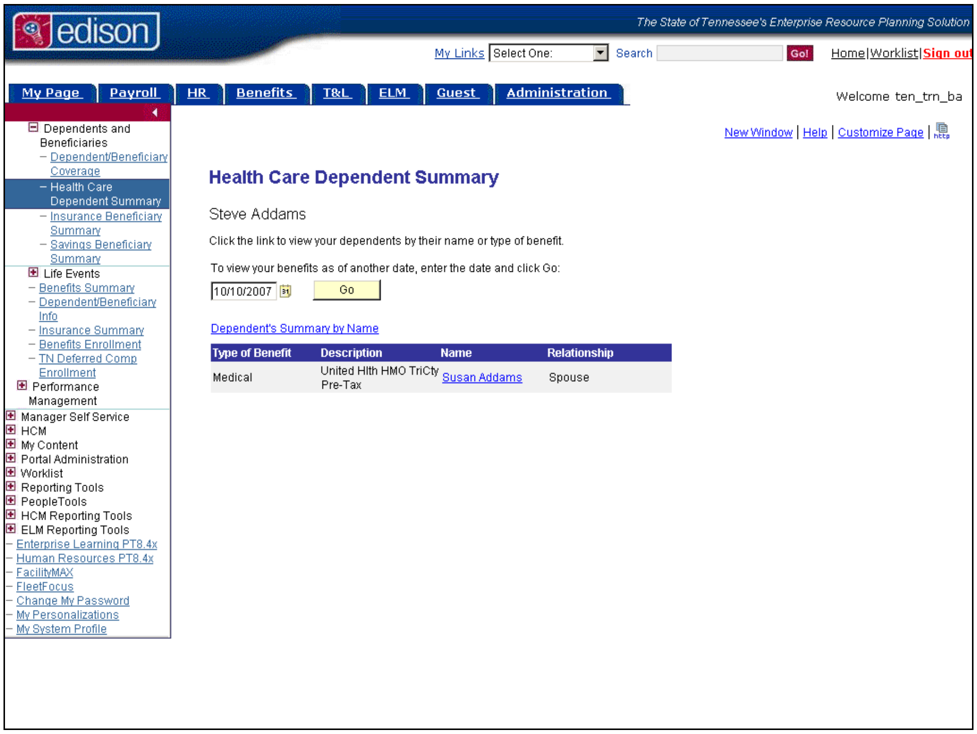
Steve Addams will be used as an example in this lesson.



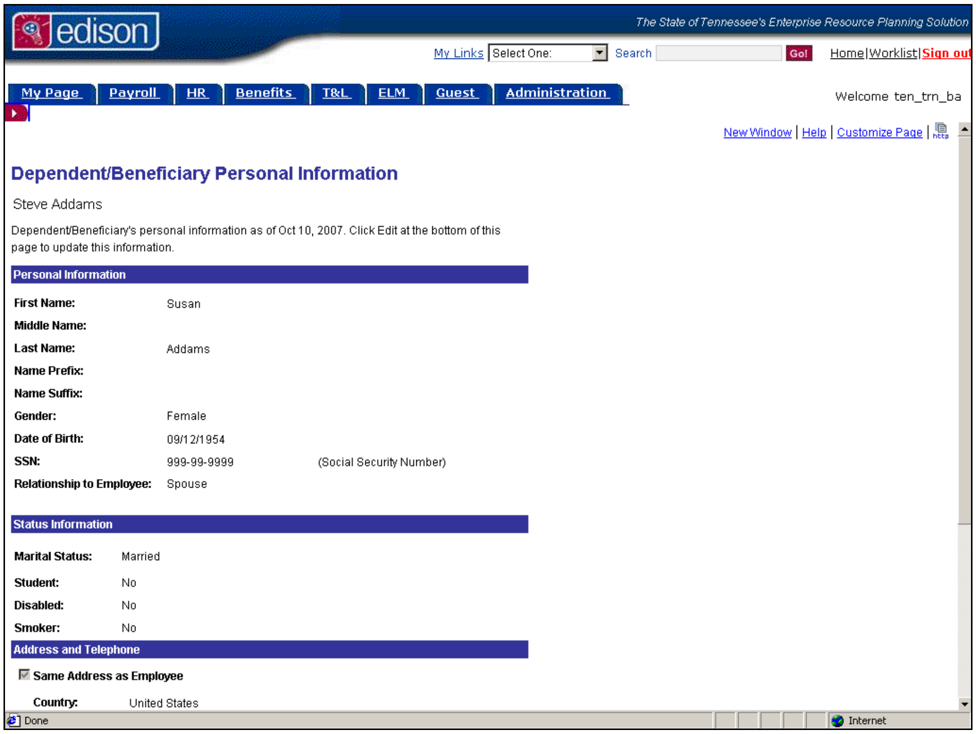
Step	Action
1.	Begin by clicking the **Employee Self Service** link. 



Step	Action
2.	Click the **Benefits** link. Benefits
3.	Click the **Dependents and Beneficiaries** link. Dependents and Beneficiaries
4.	Click the **Health Care Dependent Summary** link. Health Care Dependent Summary



Step	Action
5.	Click the **Collapse** button.
6.	**Edison** will default this date to the current date. To view the **Health Care Dependent Summary** for another date, enter the date and Click **Go.**
7.	The information displayed in the **Health Care Dependent Summary** section summarizes the dependent's health benefit information with the details of **Type of Benefit**, **Description** (of benefit), **Name** (of dependent), and **Relationship** (to employee).
8.	Click **Susan Addams** in the **Name** column to see more specific information about her. Susan Addams
9.	The **Dependent/Beneficiary Personal Information** section displays information such as **Name**, **Gender**, **Date of Birth**, and **SSN** (Social Security Number). **NOTE: Edison** is not the system of record for Beneficiaries.



Step	Action
10.	Click the navigation bar to view the rest of the information.
11.	Although it states you can update dependent information by clicking the **Edit** button, the State of Tennessee will not be utilizing this functionality. Updating dependent information will be administered by Benefits Administration.
12.	Click the **Return to Health care dependent summary** link. Return to Health care dependent summary
13.	You have successfully completed reviewing you **Health Care Depedent Summary**. **End of Procedure.**

Dependent/Beneficiary Coverage - Review

Edison allows employees to see the benefits coverage that they have selected for themselves and for their dependents using Self Service. It will also show them whether the requested changes have been made.

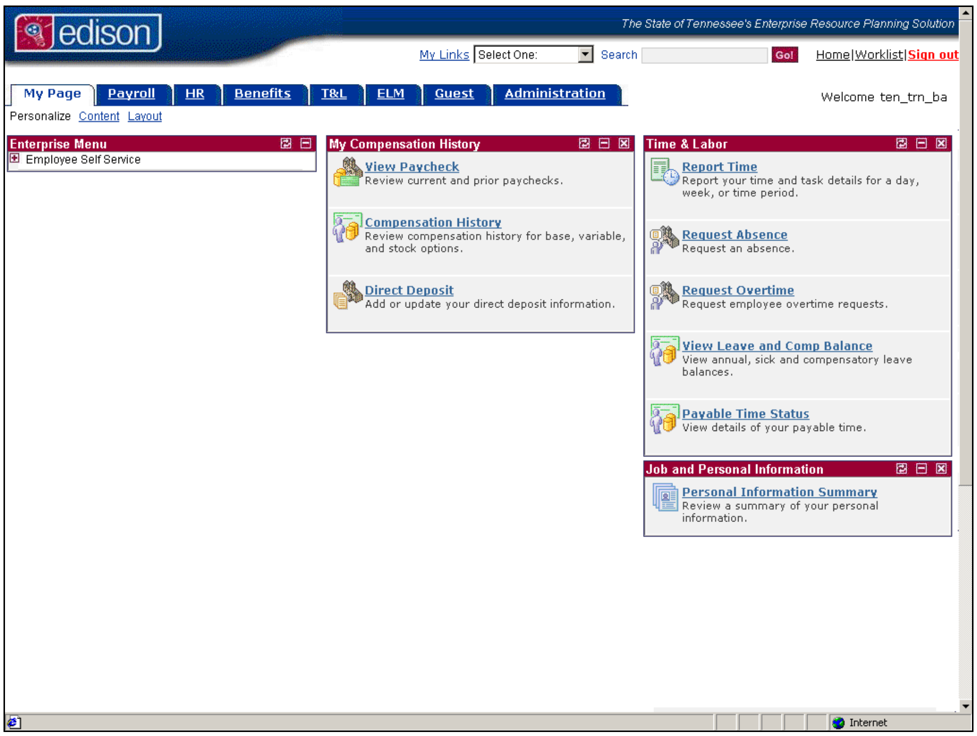
The employee can see the benefits in effect currently as well as for a prior period.

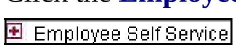
Note: In the Edison system, the **Dependent/Beneficiary** label is always grouped together. However, **Edison** is not the system of record for beneficiaries. To change your savings beneficiary information you must contact Great-West.

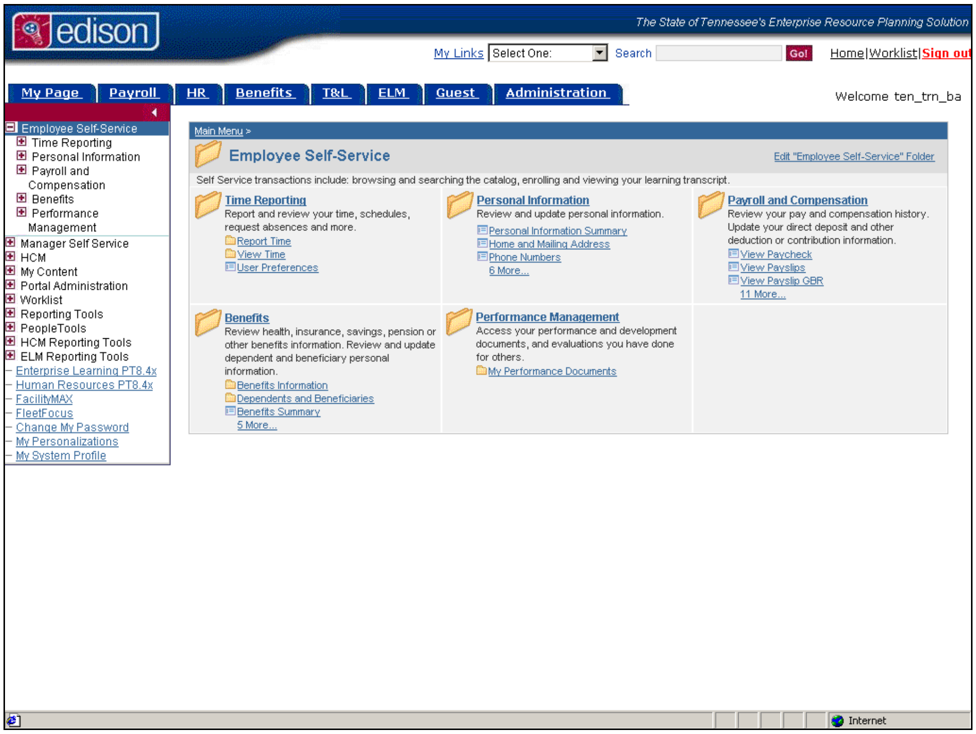
Procedure

In this lesson, you will learn how to review the types and amount of insurance coverage for your dependents.

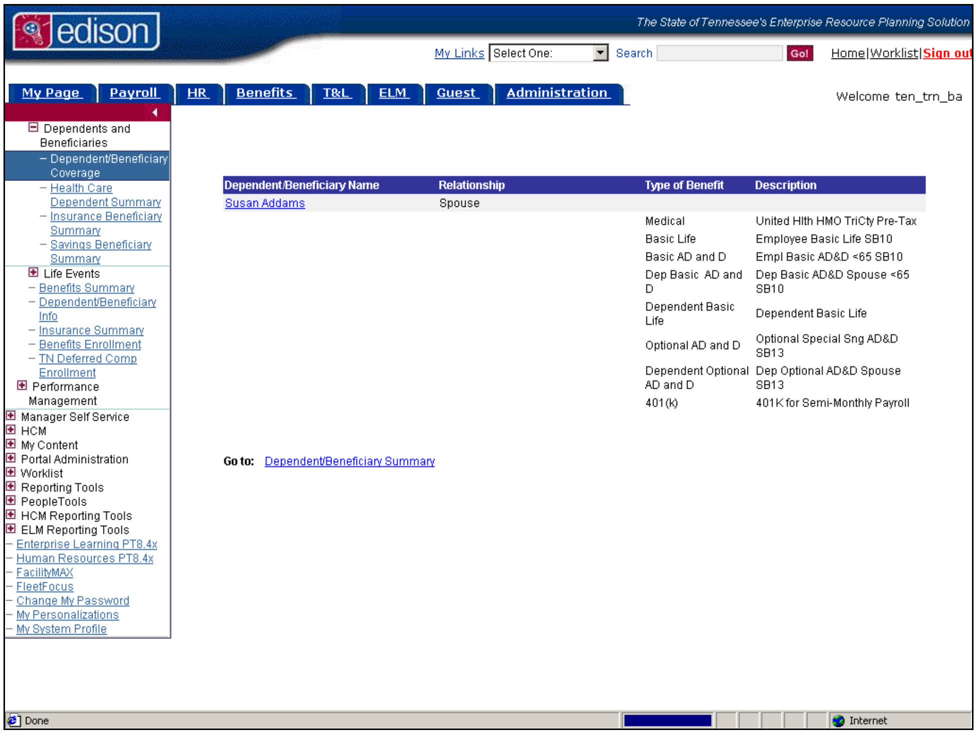
Steve Addams will be used as an example in this lesson.

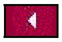


Step	Action
1.	Click the **Employee Self-Service** link. 

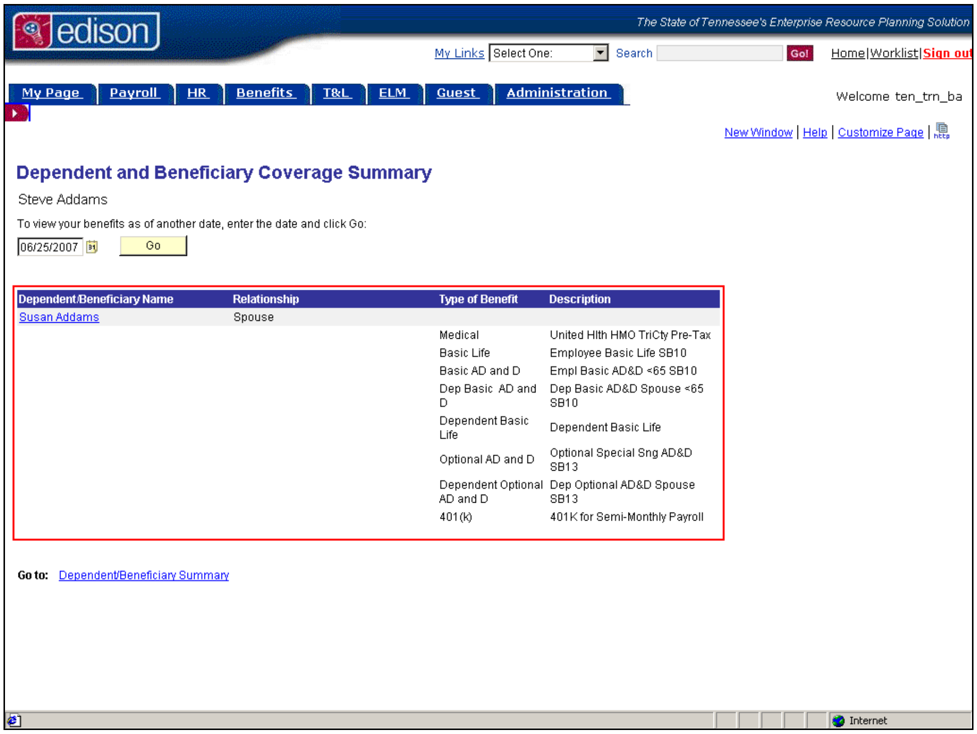


Step	Action
2.	Click the **Benefits** link. Benefits
3.	Click the **Dependents and Beneficiaries** link. Dependents and Beneficiaries
4.	Click the **Dependent/Beneficiary Coverage** link. Dependent/Beneficiary Coverage



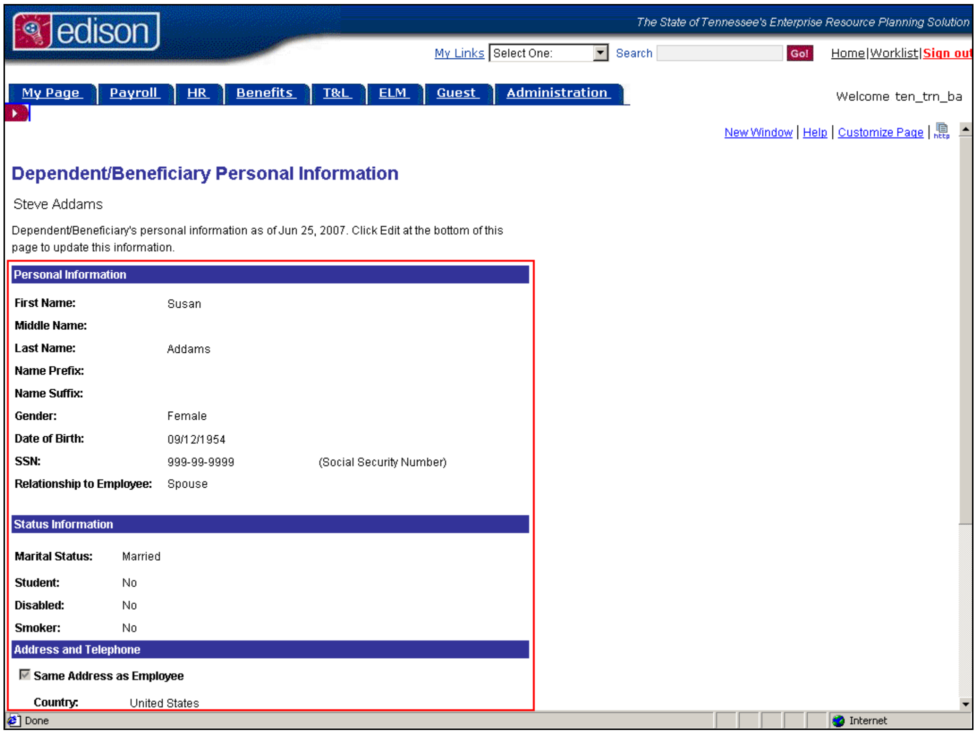
Step	Action
5.	Click the **Collapse** button to enlarge the screen. 

Step	Action
6.	**Edison** automatically displays the **Dependent and Beneficiary Coverage Summary** as of the current date. If you need to see the benefits as of a prior date, enter the **Date** in the **Date Field** and **Click Go.** For this example, we will retain the default date.

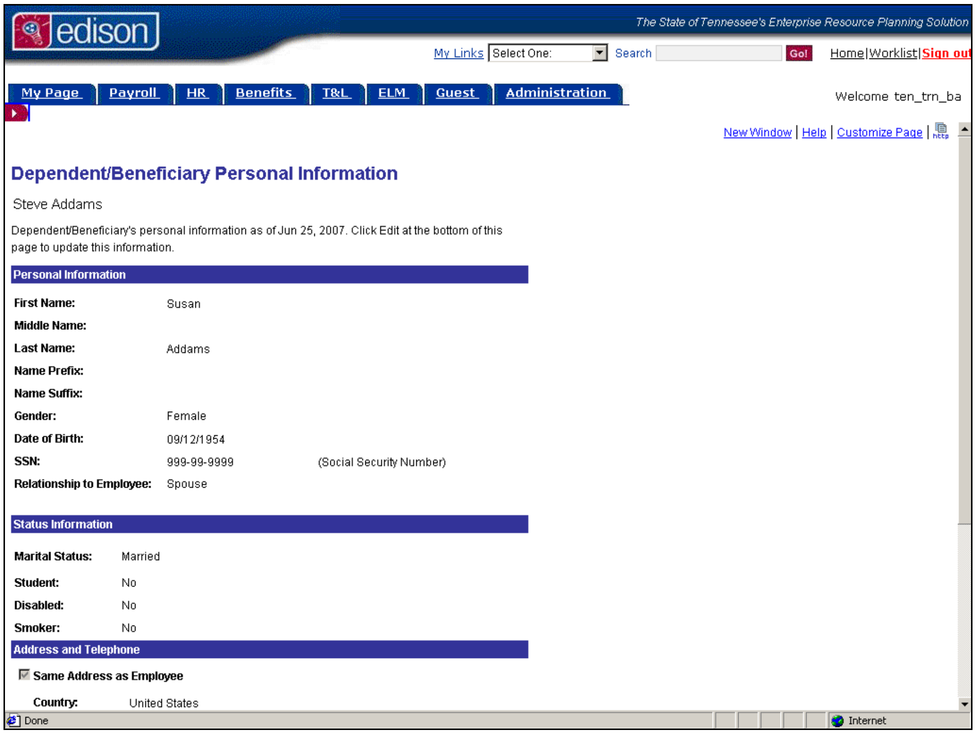


Step	Action
7.	The **Dependent and Beneficiary Coverage Summary** section lists all your dependents and the coverage for each specific individual.

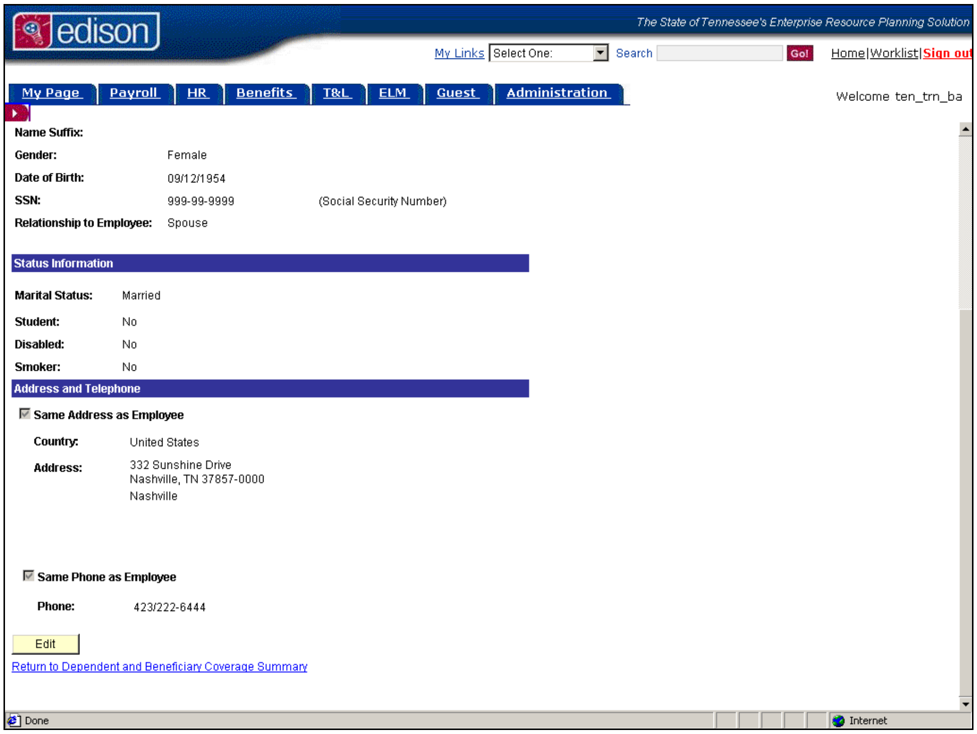
Step	Action
8.	Click an entry in the **Dependent/Beneficiary Name** column to see specific information about that individual. Susan Addams



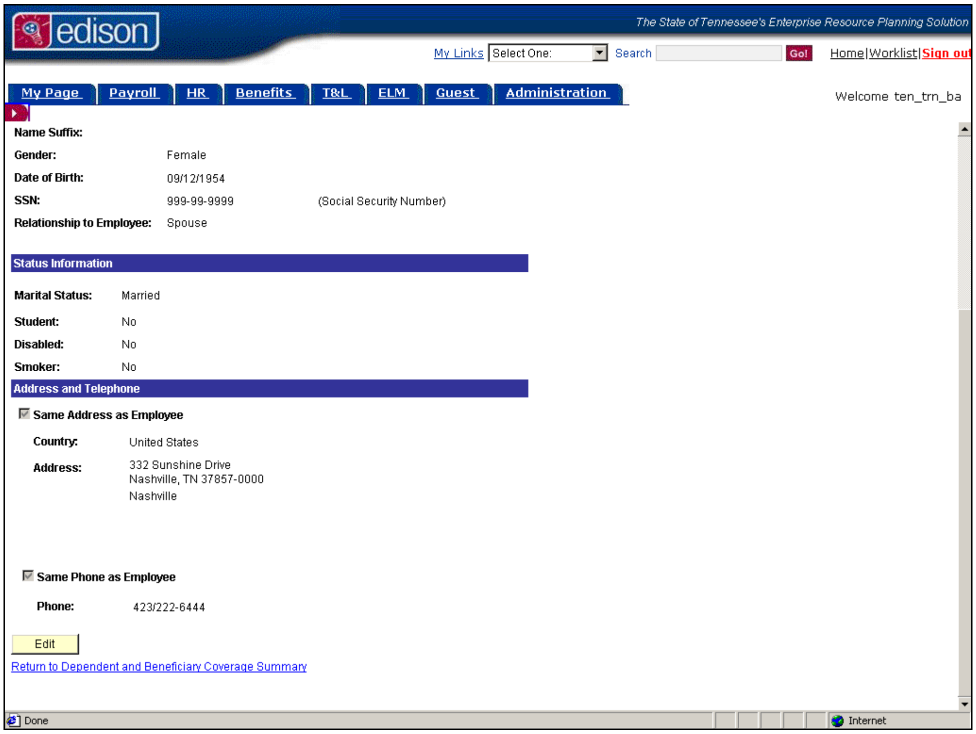
Step	Action
9.	The **Dependent/ Beneficiary Personal Information** section displays information such as **Name, Gender, Date of Birth, SSN (Social Security Number), Relationship to Employee,** and **Marital Status.**



Step	Action
10.	Click the scrollbar to see additional information.



Step	Action
11.	The **Edit** button, which is used to update Dependent information will be enabled. However, the State of Tennessee will not be utilizing this functionality. Updating dependent information will be administered by Benefits Administration.



Step	Action
12.	Click the **Return to Dependent and Beneficiary Coverage Summary** link to return to the prior page.

Step	Action
13.	You have successfully completed reviewing your **Dependent/Beneficiary Coverage.** **End of Procedure.**

Deferred Comp Enrollment - Review and Update

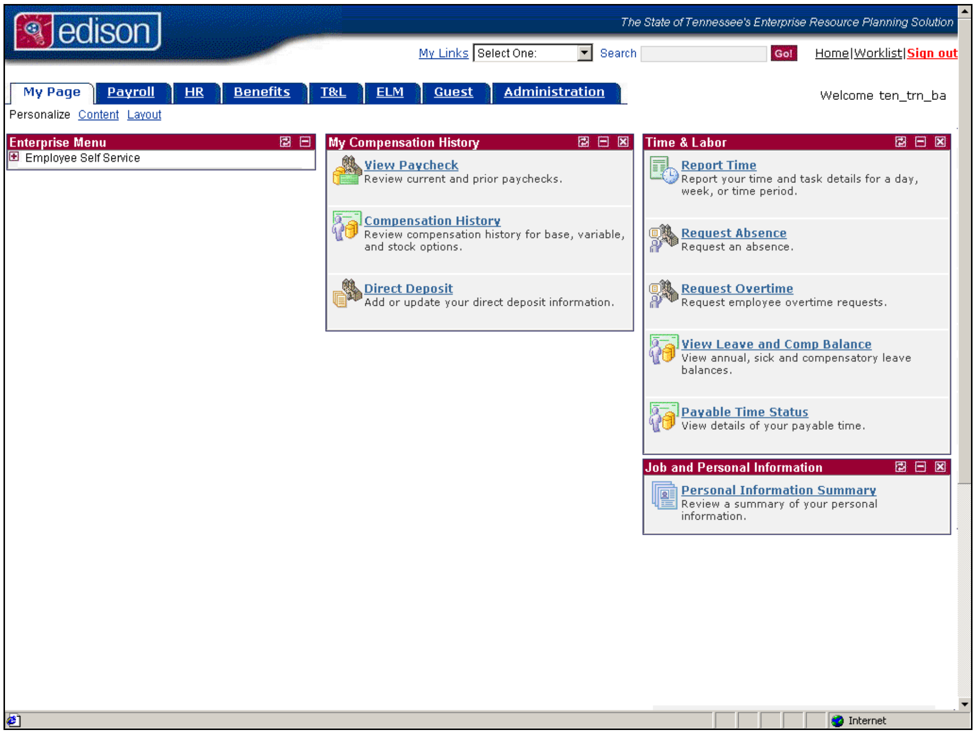
Edison allows employees to access **Deferred Compensation** using Self Service.

Deferred Compensation allows employees to save a portion -- either a flat amount or a percentage -- of their salary, bonus or longevity pay to their 401K or 457.

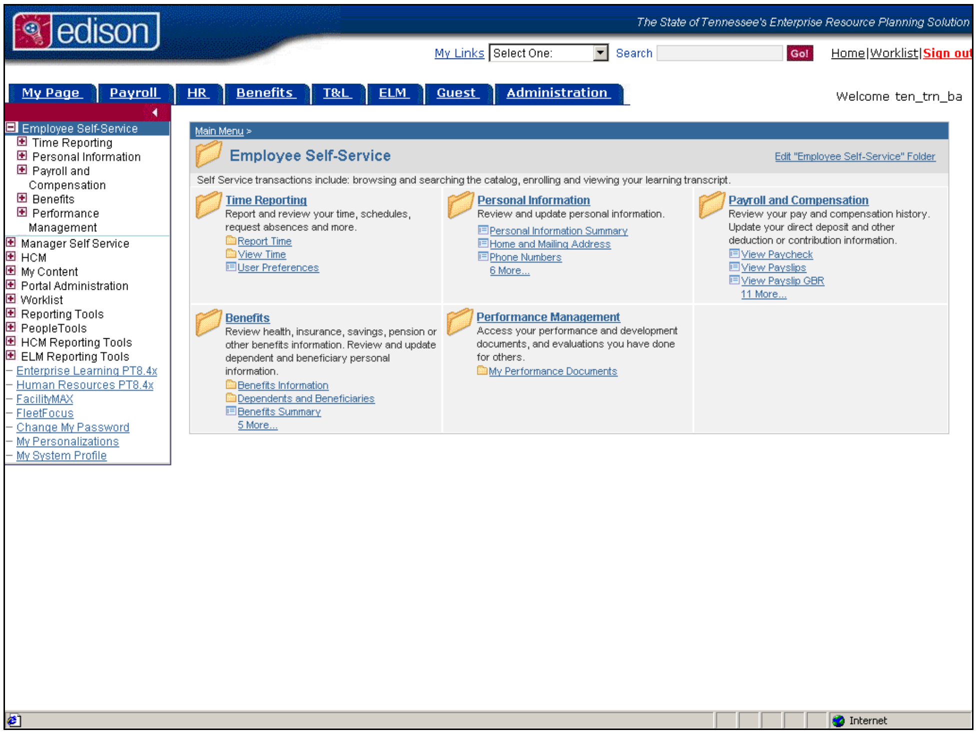
Procedure

In this lesson, you will learn to review and modify the amount details for **Deferred Compensation**.

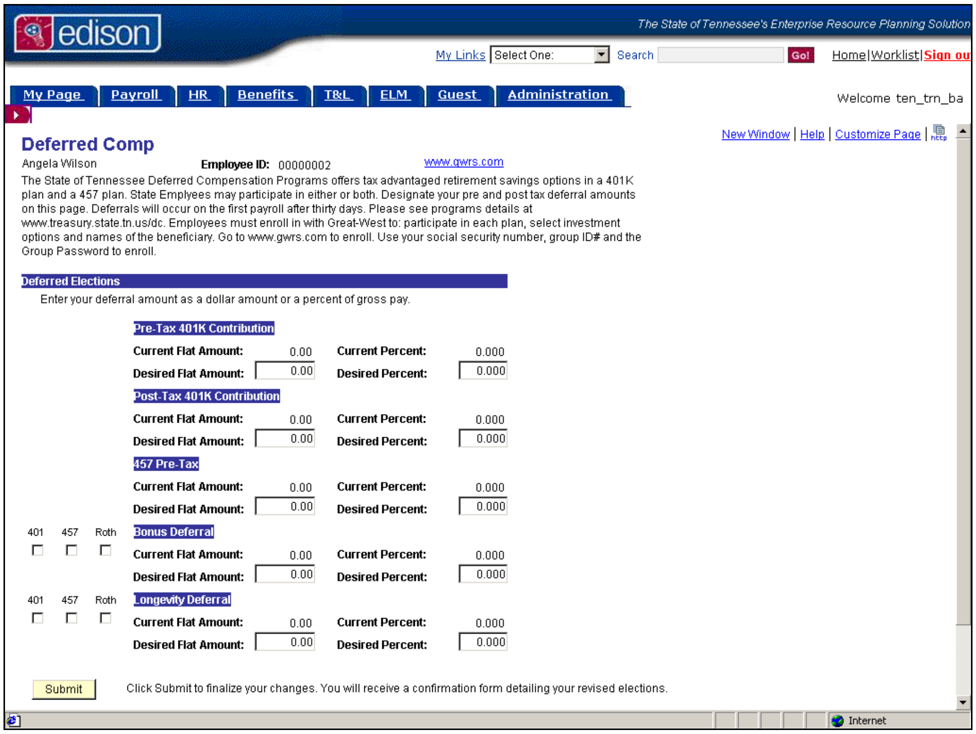
Angela Wilson will be used as an example in this lesson.



Step	Action
1.	Begin by clicking the **Employee Self Service** link. Employee Self Service



Step	Action
2.	Click the **Benefits** link. Benefits
3.	Click the **TN Deferred Comp Enrollment** link. TN Deferred Comp Enrollment
4.	Click the **Collapse** button.
5.	The **Deferred Elections** section displays the various contributions to your 401k and 457 accounts that can be modified. It also displays Bonus and Longevity Deferral, which can be deferred to a 401k or 457. Deferrals will occur on the first payroll after 30 days. **NOTE**: Click on the www.gwrs.com link to select investment options.



Step	Action
6.	Click in the **Desired Flat Amount** field. **Note**: For this example, the field will be cleared once you click into it. 0.00
7.	Enter "**60.00**" into the **Desired Flat Amount** field.
8.	Click in the **Desired Flat Amount** field. **Note**: For this example, the field will be cleared once you click into it. 0.00
9.	Enter "**40.00**" into the **Desired Flat Amount** field.
10.	Click in the **Desired Percent** field. **Note**: For this example, the field will be cleared once you click into it. 0.000
11.	Enter "**6**" into the **Desired Percent** field.
12.	Click in the **Desired Flat Amount** field. **Note**: For this example, the field will be cleared once you click into it. 0.00

Step	Action
13.	Enter "**120.00**" into the **Desired Flat Amount** field.
14.	Click the **401** option to put the **Bonus Deferral** amount in the **401k** account.
15.	Click the **457** option to put the **Longevity Deferral** amount in the **457** account.
16.	Click the **Submit** button. Submit
17.	You have successfully reviewed and modified your **Deferred Compensation** details. **End of Procedure.**

Flexible Spending Accounts - Review

Edison allows employees to access their **Flexible Spending Account** using Self Service. They can navigate from summary level pages to more detailed information by clicking the appropriate plan links.

Flexible spending accounts (FSAs) are plans that enable employees to save money for out-of-pocket health or dependent care expenses by enabling them to pay with pretax dollars. There are two types of these accounts:

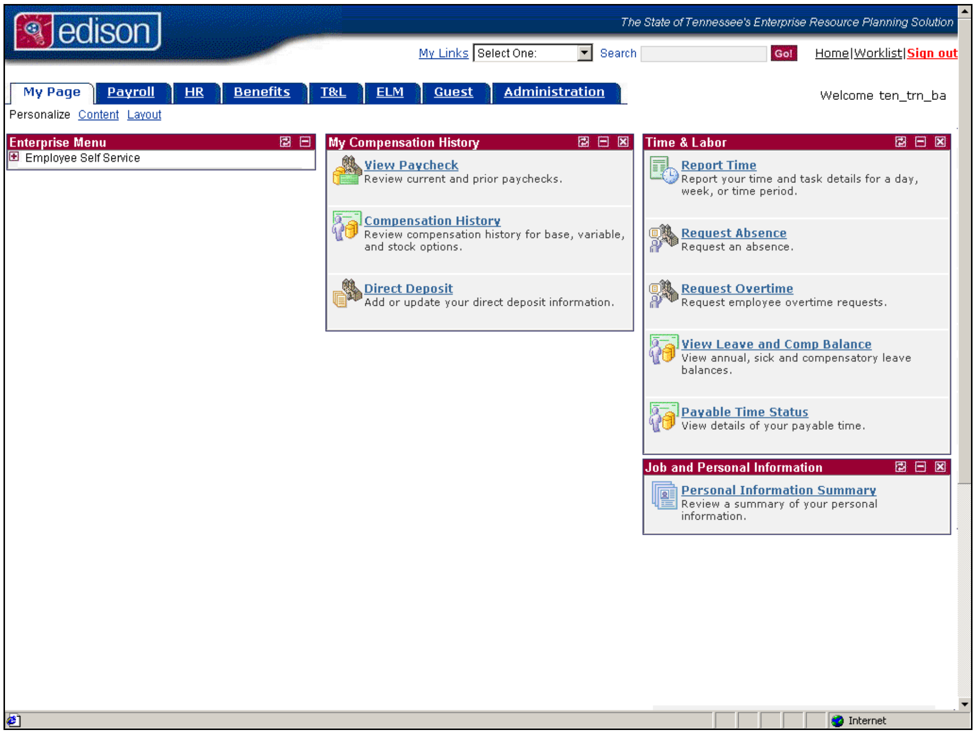
Medical Expense Reimbursement Account (MERA)- Employees can elect to contribute money on a pretax basis to this type of account and later reimburse themselves for certain qualifying medical expenses. They can withdraw the annual pledge amount before the accrual.

Dependent Care Reimbursement Account (DCRA)- Employees contribute pretax dollars into this account and use it to reimburse themselves for day care expenses.

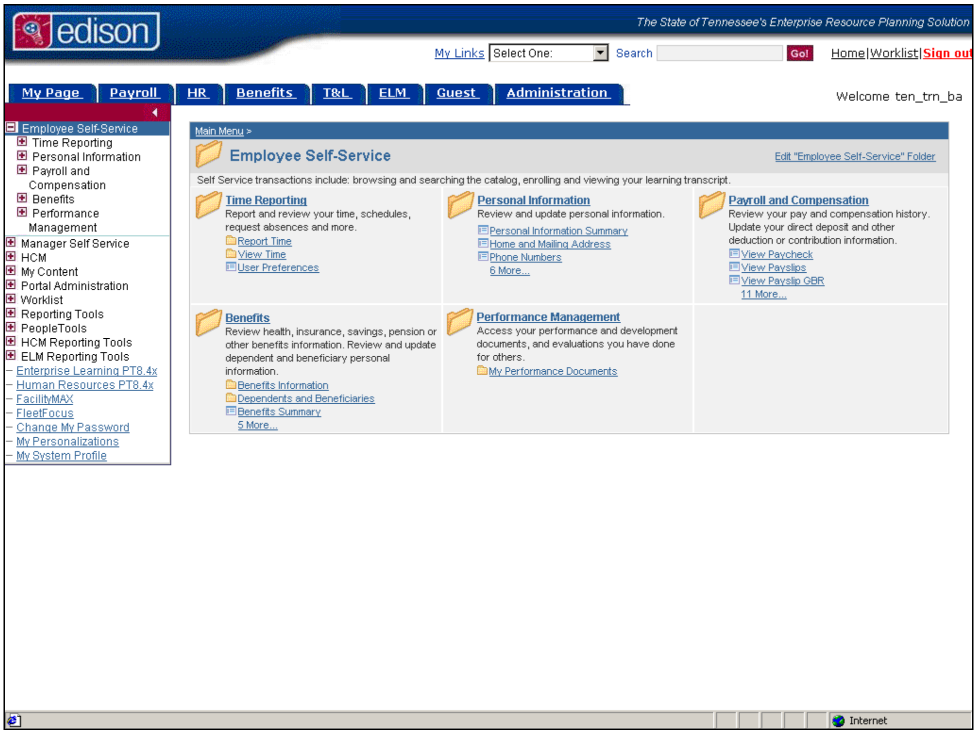
Procedure

In this lesson, we will learn the process for reviewing the **Flexible Spending Accounts** information.

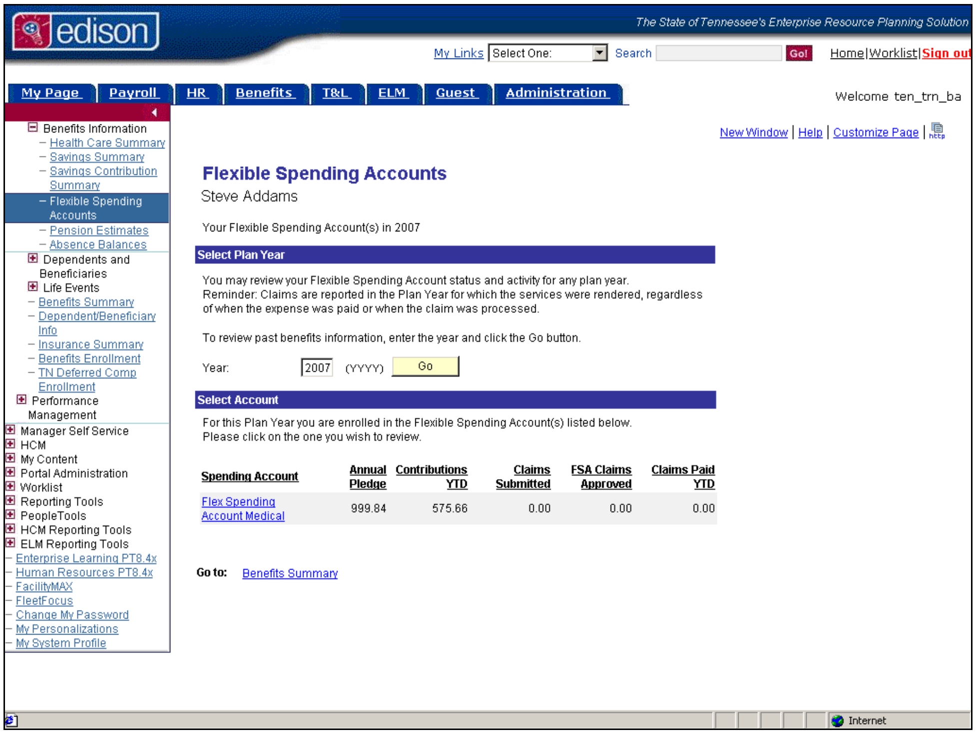
Steve Addams will be used as an example in this lesson.

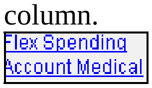


Step	Action
1.	Begin by clicking the **Employee Self Service** link. Employee Self Service

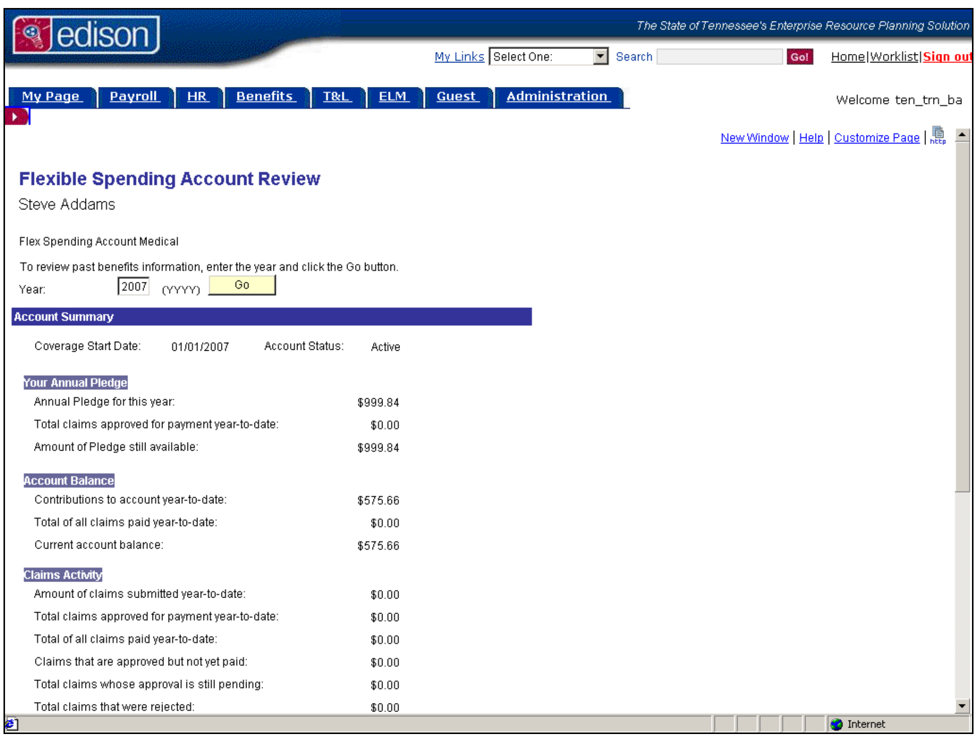


Step	Action
2.	Click the **Benefits** link. Benefits
3.	Click the **Benefits Information** link. Benefits Information
4.	Click the **Flexible Spending Accounts** link. Flexible Spending Accounts



Step	Action
5.	Click the **Collapse** button to enlarge the screen. 
6.	**Edison** will default to the current year in the **Select Plan Year** section. If you want to view the details of **Flexible Spending Accounts** for the previous year, enter the appropriate year and click **Go**. Account information prior to **Edison** implementation will not be available through the system.
7.	The **Select Account** section lists the various **Flexible Spending Accounts** in which an employee is enrolled for that plan year. For each **Spending Account**, the **Annual Pledge**, **Contributions YTD**, **Claims Submitted**, **FSA Claims Approved** and **Claims Paid YTD** will be displayed.
8.	Click on the **Flexible Spending Account Medical** entry in the **Spending Account** column. 

Step	Action
9.	The **Account Summary** section provides a detailed description of the spending account, including information about the **Annual Pledge**, **Account Balance**, **Claims Activity**, **Claim History** and **Payment History**. **Coverage Start Date** shows the beginning date for the Flexible Spending Account. This date must be on or after the Employment Start date. Your **Annual Pledge** displays the total dollar value which needs to be deposited in the Flexible Spending Account on an annual basis. **Account Balance** refers to the details of the deposited amount, claim amount, and the current balance. **Claims Activity** refers to the details of the various transactions such as the amount of claims submitted and the total claims approved for payment year-to-date.



Step	Action
10.	Click the scrollbar to see the details of **Claims History** and **Payment History**.
11.	**Claim History** and **Payment History** refer to the past records for the various amounts claimed and the corresponding payments made.

Step	Action
12.	Click the **Return to Flexible Spending Accounts** link. Return to Flexible Spending Accounts
13.	You have successfully completed reviewing your **Flexible Spending Accounts** information. **End of Procedure.**

My Learning

Activities - All Learning

Edison allows employees to view the complete list of their **Learning Activities** using Self Service.

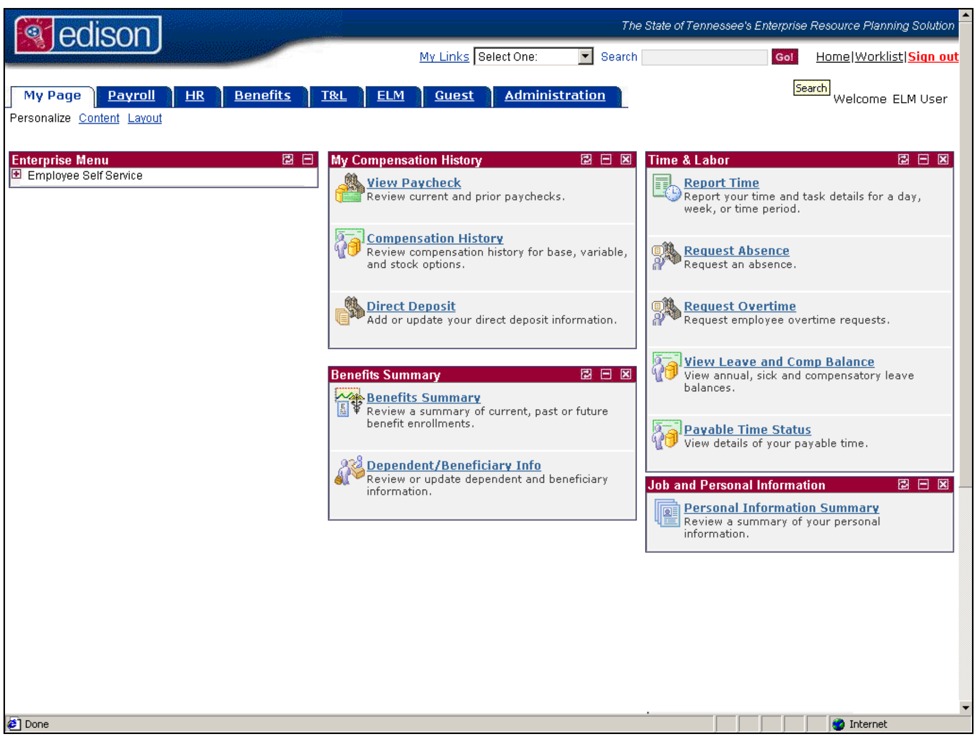
Employees can view all learning activities that are scheduled or planned, as well as any activities in which they are currently enrolled or that have been completed or waived. Additionally, they can use this page to enroll in, drop, or modify learning activities, or to launch a web-based learning activity.

This page can also be used as a record of training history.

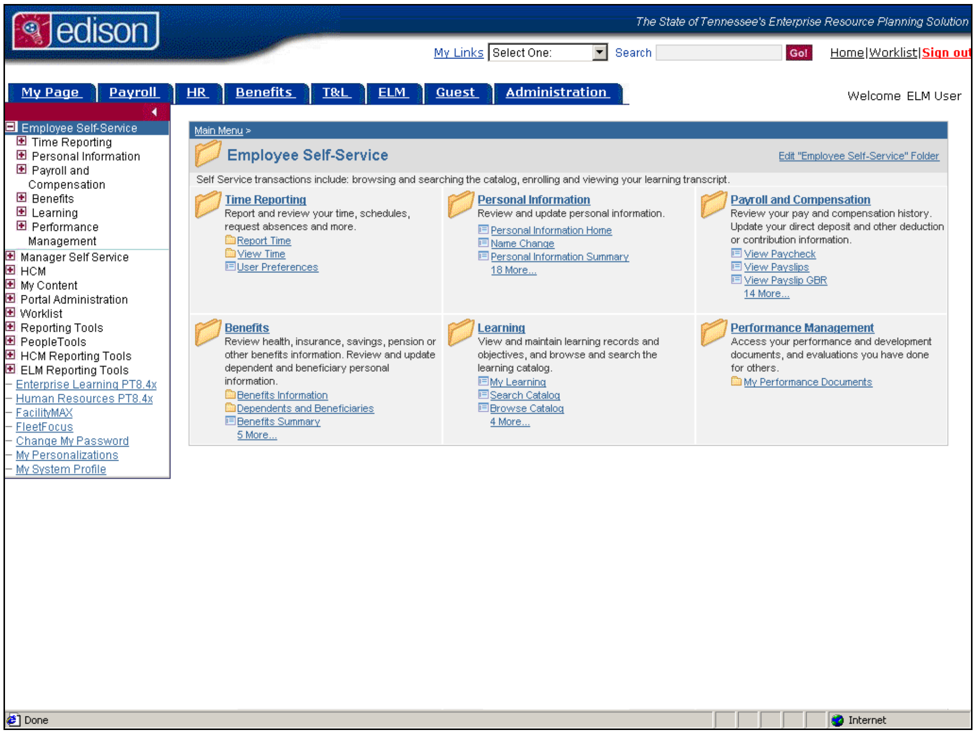
Procedure

In this lesson, you will learn to view your learning activities through **All Learning** component.

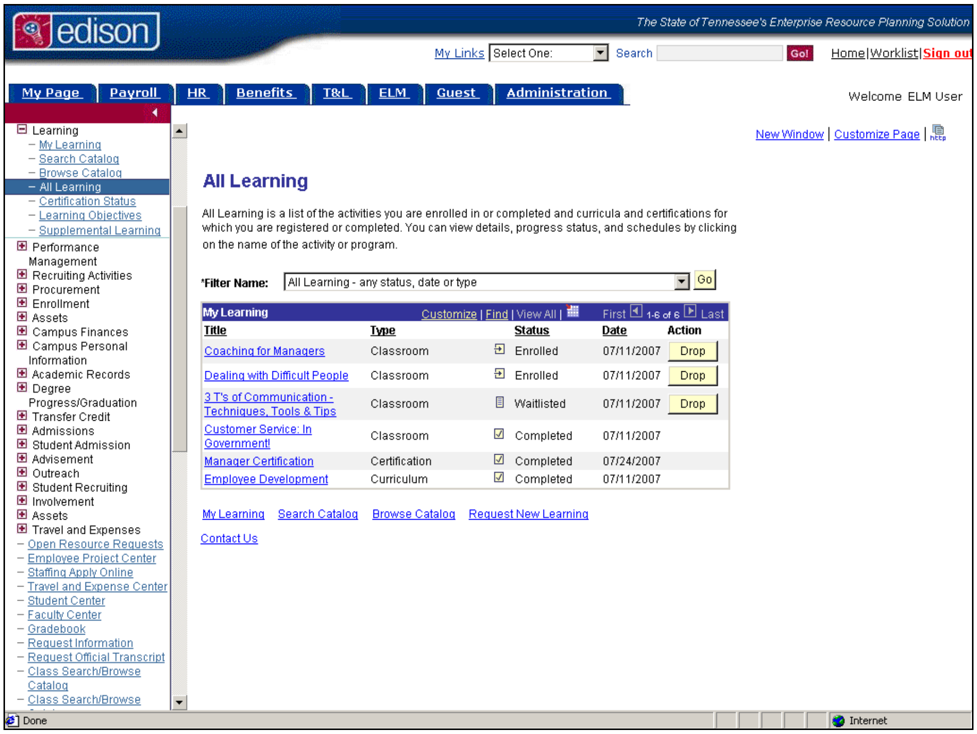
Christian Lomax will be used as an example in this lesson.



Step	Action
1.	Begin by clicking the **Employee Self-Service** link. Employee Self Service



Step	Action
2.	Click the **Learning** link. Learning
3.	Click the **All Learning** link. All Learning



Step	Action
4.	Click the **Collapse** button to enlarge the screen. 
5.	A Learner can display learning based upon what **Filter Name** is chosen. The **Filter Name** defaults to 'All Learning - any Status date or type'.
6.	Other **Filter Name** options are: All Planned, Requested, and Offered. Completed External and Internal Learning. Completed Learning for this calendar year. Learning for last 90 days, not dropped or deleted.
7.	The **All Learning** page lists all the activities in which the employee is enrolled, is waitlisted for, or has completed.
8.	Click the **Dealing with Difficult People** item in the **Title** list to see additional details about that topic. Dealing with Difficult People
9.	The **Dealing with Difficult People** page displays detailed information about that class, including **Name**, **Code**, **Price per Seat**, **Type**, and **Contact**.
10.	You have successfully completed viewing your **Learning Activities**. **End of Procedure.**

Activities - My Learning

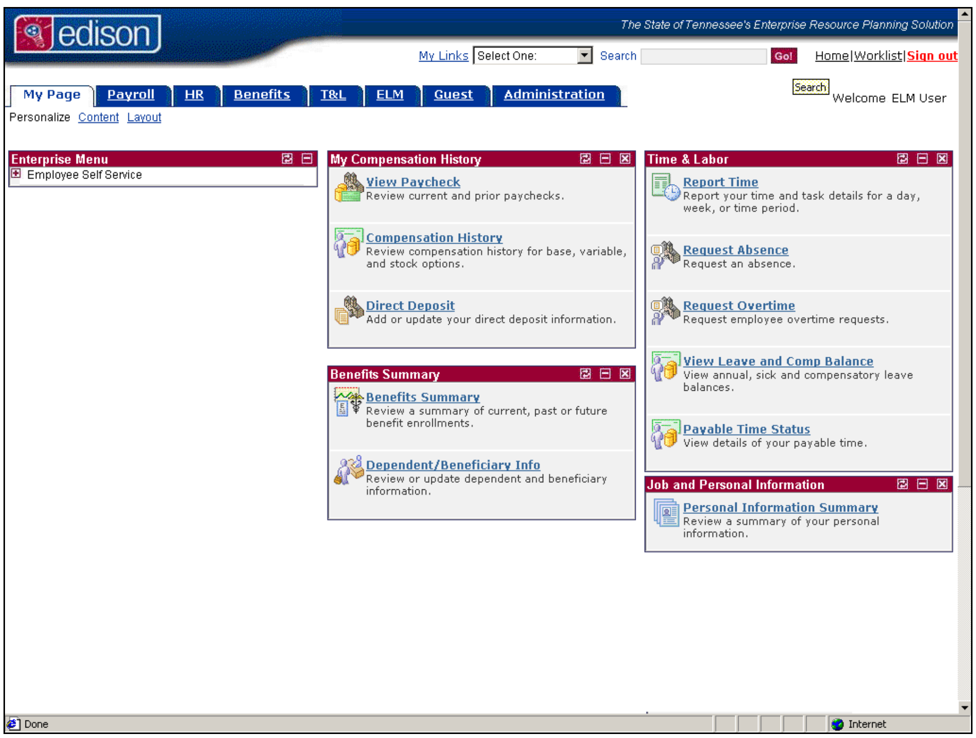
Edison will allow employees to view their learning activities using Self Service.

This will allow employees to see the summary of all the courses they have taken and the corresponding status.

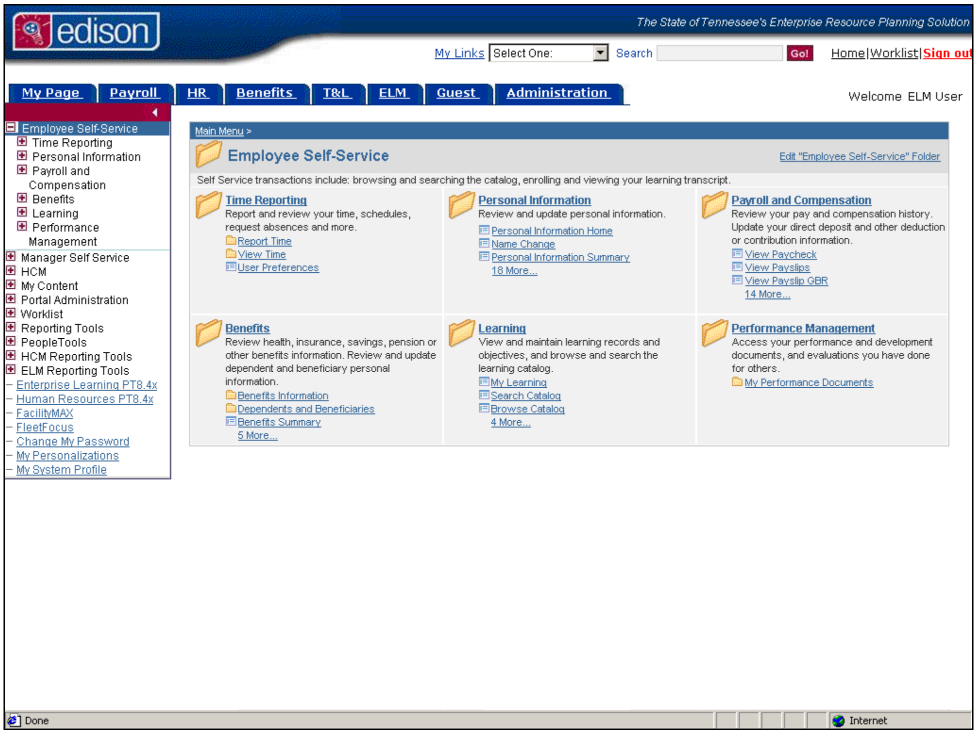
Procedure

In this lesson, you will learn to view your learning activities and objectives through **My Learning**.

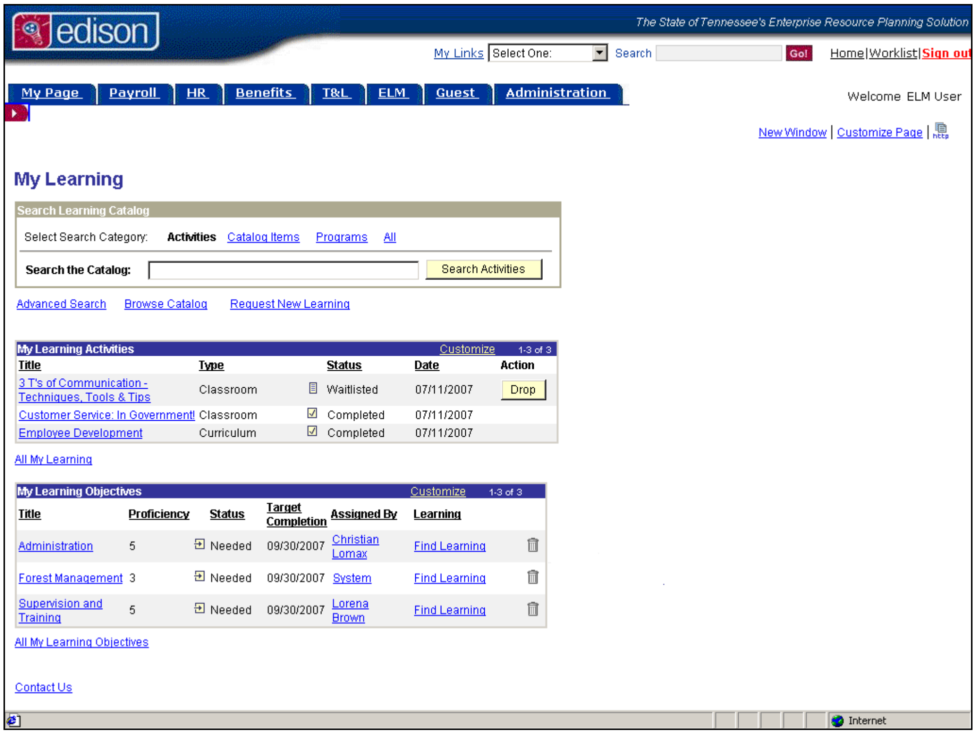
Christian Lomax will be used as an example in this lesson.



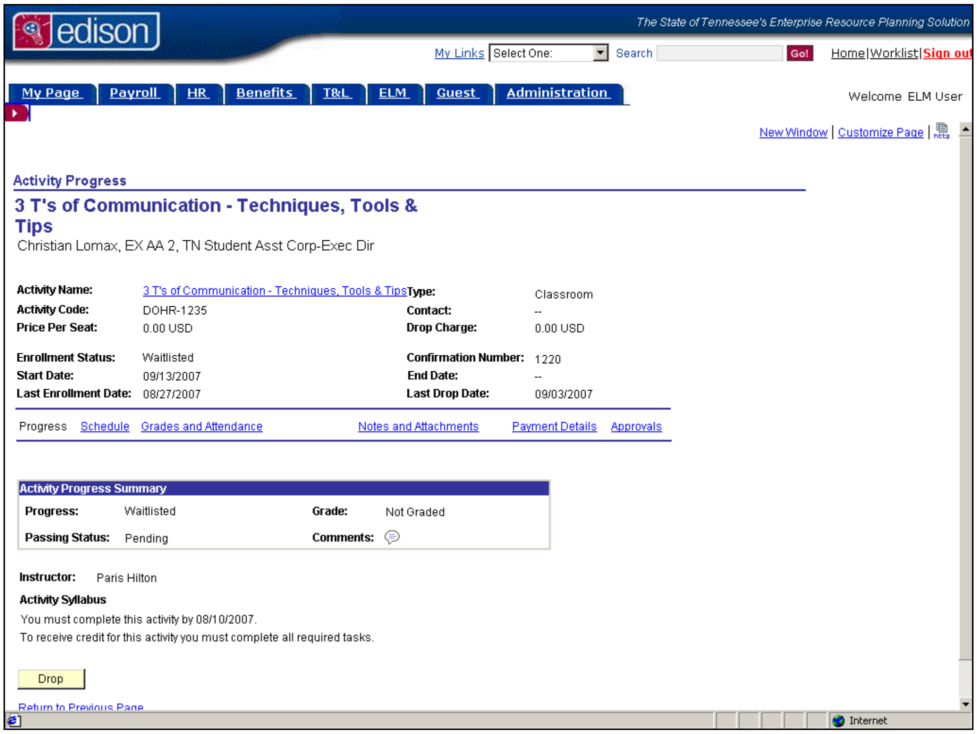
Step	Action
1.	Begin by clicking the **Employee Self Service** link. Employee Self Service



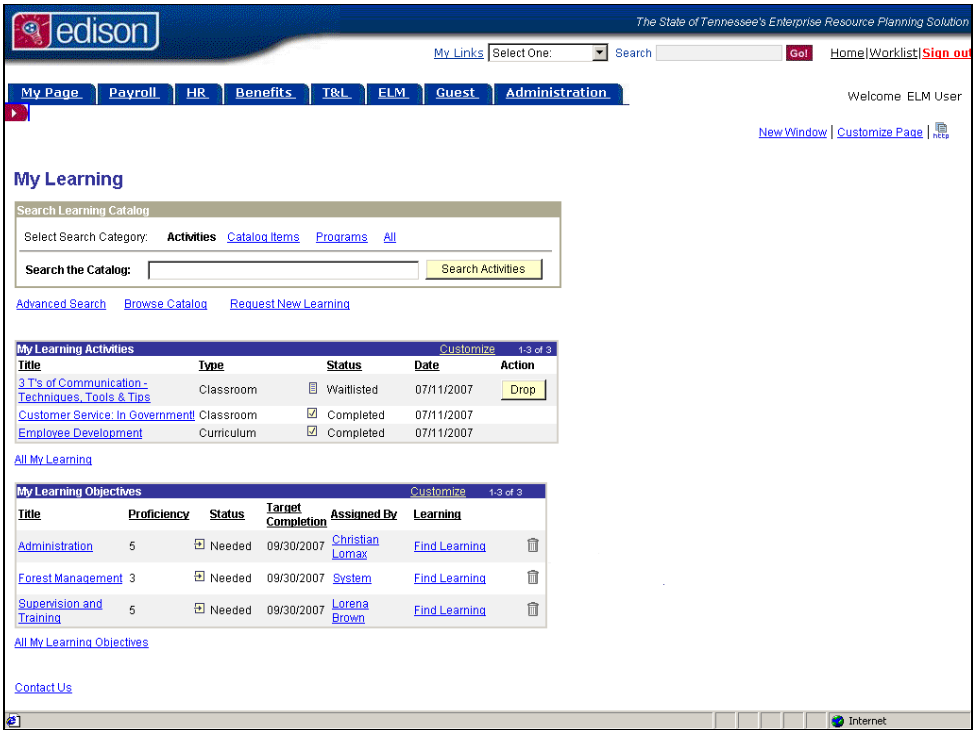
Step	Action
2.	Click the **Learning** link. Learning
3.	Click the **My Learning** link. My Learning
4.	Click the **Collapse** button to enlarge the screen. 
5.	The **My Learning** section displays the various learning activities which the employee has enrolled in, completed, or has been waitlisted for. It provides the details of **Title** (name of the learning activity), **Type** (method of delivery), **Status, Date** and **Action.** Note that **Action** is only available for Enroll and Drop if you are within the enroll and drop dates for that Activity.



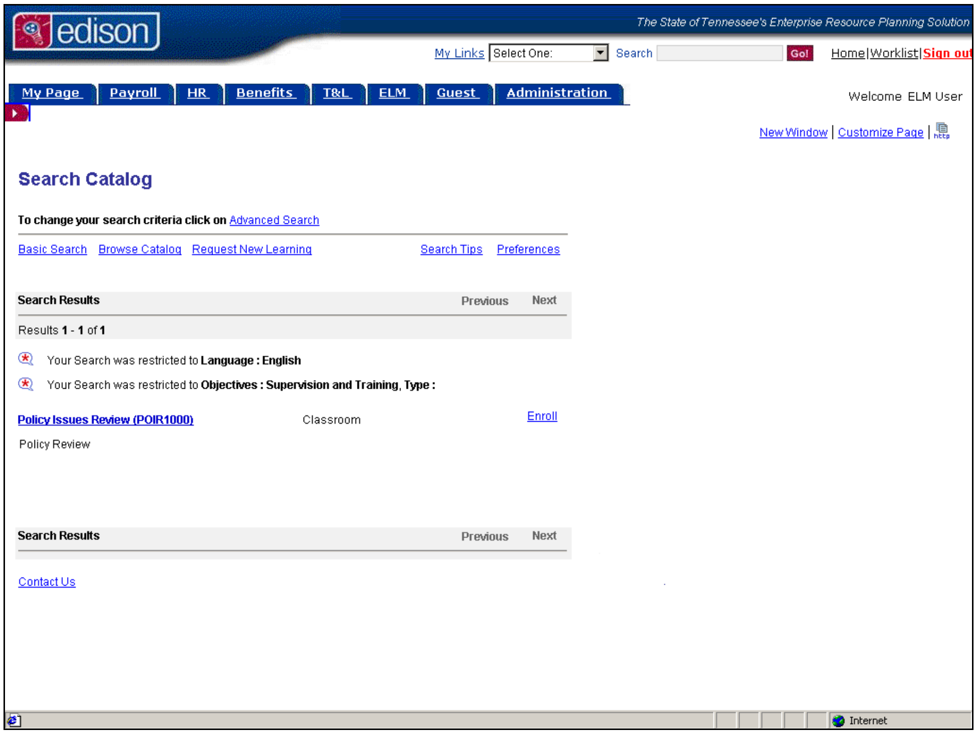
Step	Action
6.	Click on the **3 T's of Communication - Techniques, Tools & Tips** entry in the **Title** column to see the details of that learning activity. 3 T's of Communication - Techniques, Tools & Tips
7.	This page displays information on **3 T's of Communication-Techniques, Tools & Tips,** including **Name**, **Price per seat**, **Type**, **Contact**, and **Start Date**. It also provides an **Activity Progress Summary**, including Christian Lomax's **Progress**, **Grade**, **Passing Status** and **Comments**.



Step	Action
8.	Click the **Return to Previous Page** link. Return to Previous Page
9.	The **My Learning Objectives** section shows you the **Title** of all of the objectives that have either been assigned to you via the HR System or from your Manager. It will also display those objectives that you have assigned to yourself. This section will also display the **Proficiency** needed, the **Status**, the **Target Completion Date**, and **Assigned By** (who assigned the objective). You will learn more about objectives in the **Learning Objectives** lesson.

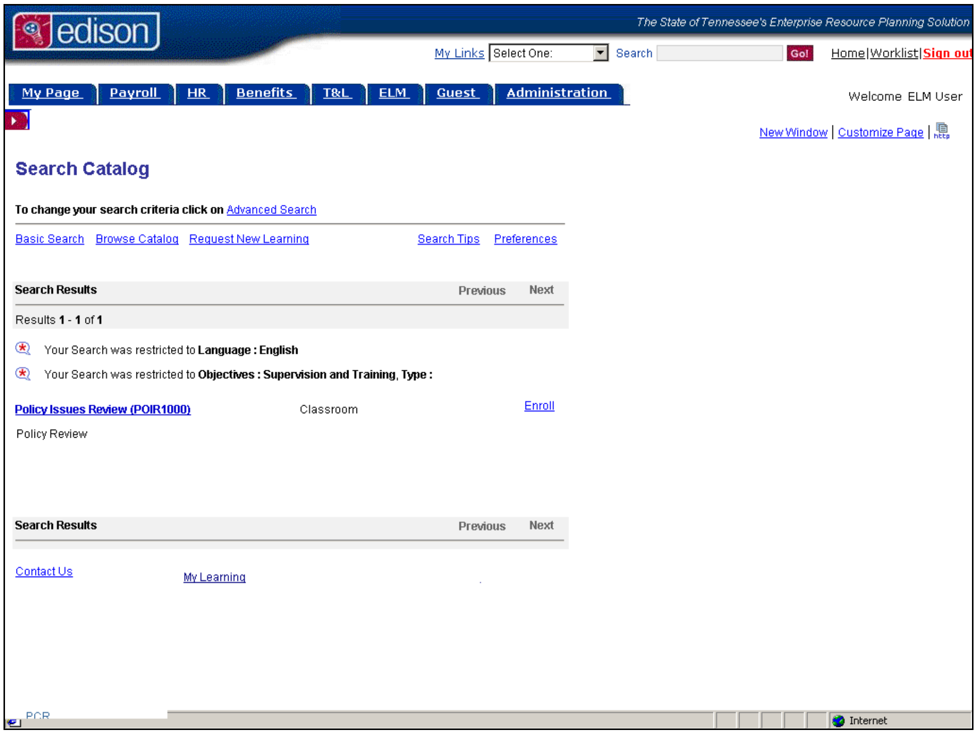


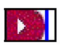
Step	Action
10.	Click the **Find Learning** link for the **Supervision and Training** objective. Find Learning



Step	Action
11.	Click the **Enroll** link to enroll in the course. Enroll
12.	By looking at the course offerings, you notice that no classes are available for enrollment at this time. You will need to return to this page at a later date in enroll in this class.

Step	Action
13.	Click the **Return to Previous Page** link. Return to Previous Page



Step	Action
14.	Click the **Expand Menu** button to navigate back to **My Learning**. 
15.	Click the **My Learning** link. 
16.	You have successfully completed viewing the list of your learning activities and objectives. **End of Procedure.**

Course Offerings -Search the Catalog

Edison allows employees to search the catalog for activities to enroll in using Self Service.

Users can search the catalog for learning activities, catalog items, and programs that meet their selection criteria. By selecting an activity or program, users can see a detailed description.

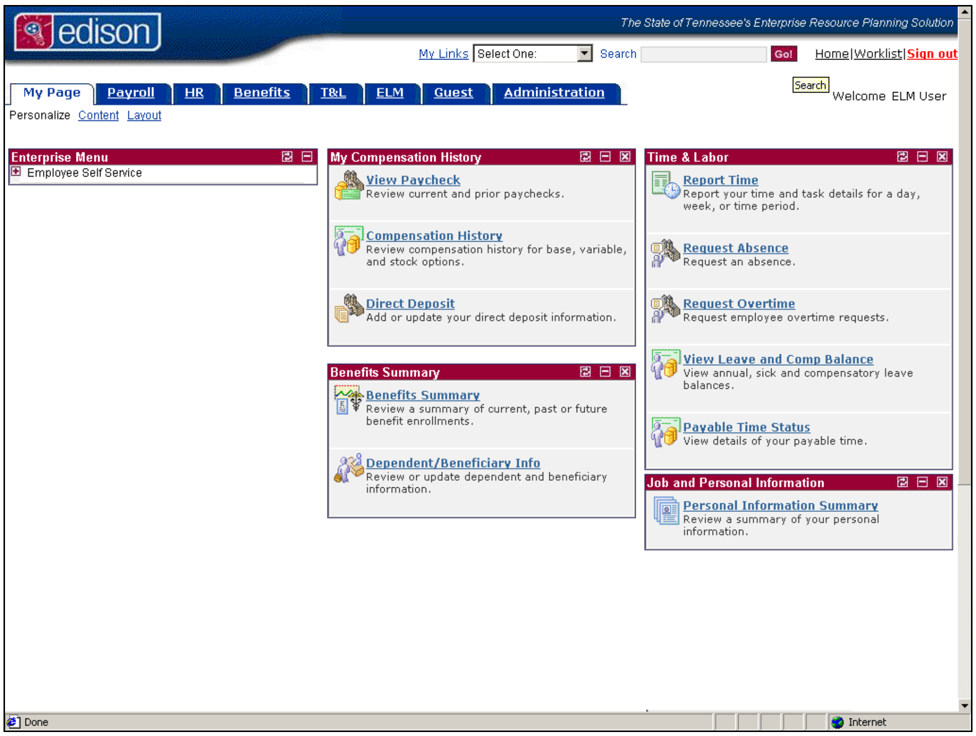
Enterprise Learning Management provides two options for searching the catalog:

* **Basic search:** for searching by an activity or program's title, description, or both.
* **Advanced search:** for filtering learning activities and programs using multiple selection criteria.

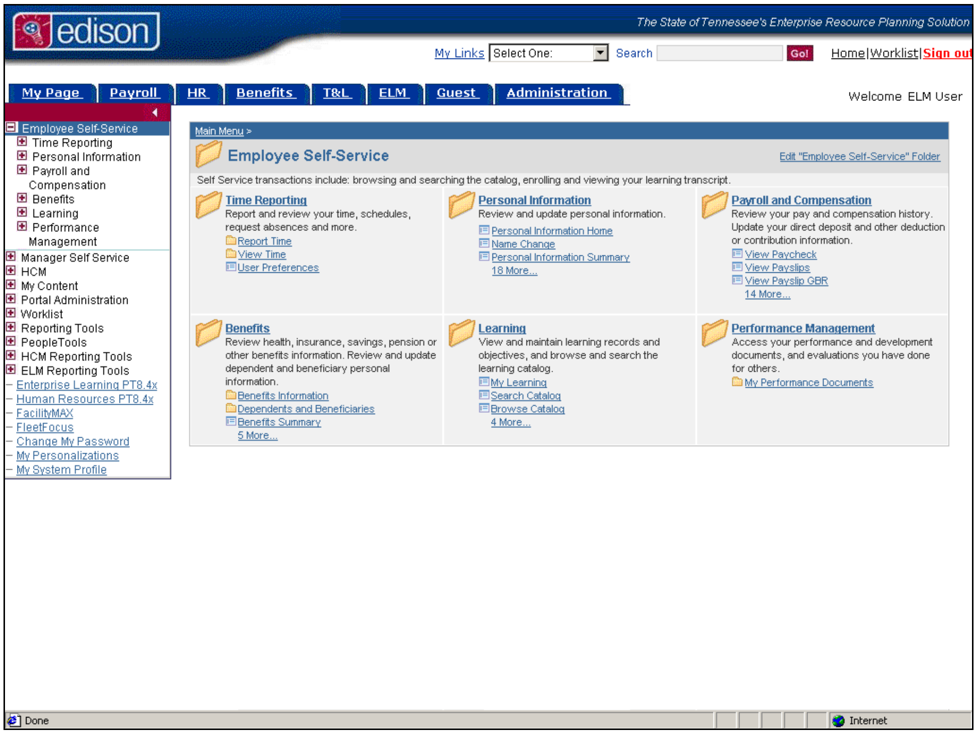
Procedure

In this lesson, you will learn how to browse and search for the activities within your catalog through the **Search Catalog** component. You will then be able to enroll in a desired activity.

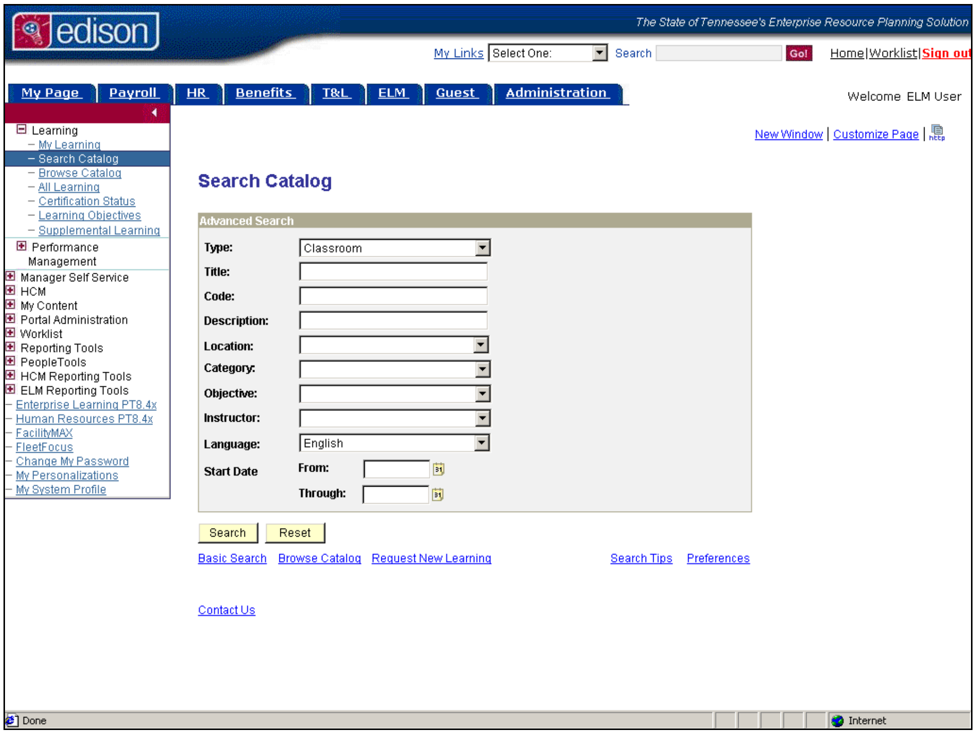
Christian Lomax will be used as an example in this lesson.



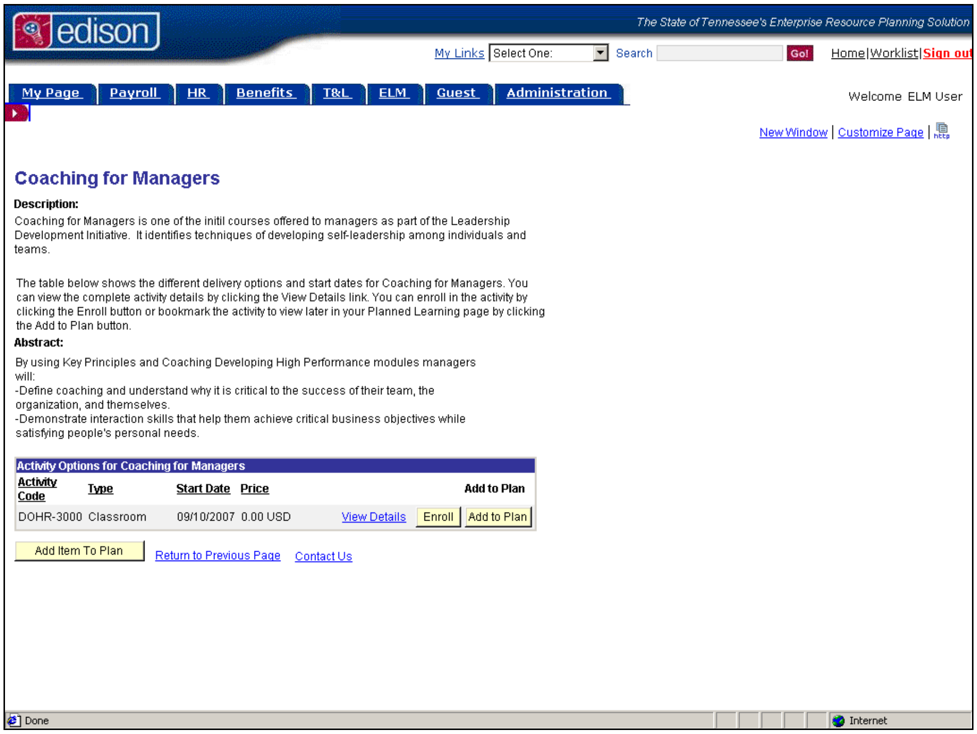
Step	Action
1.	Begin by clicking the **Employee Self Service** link. Employee Self Service



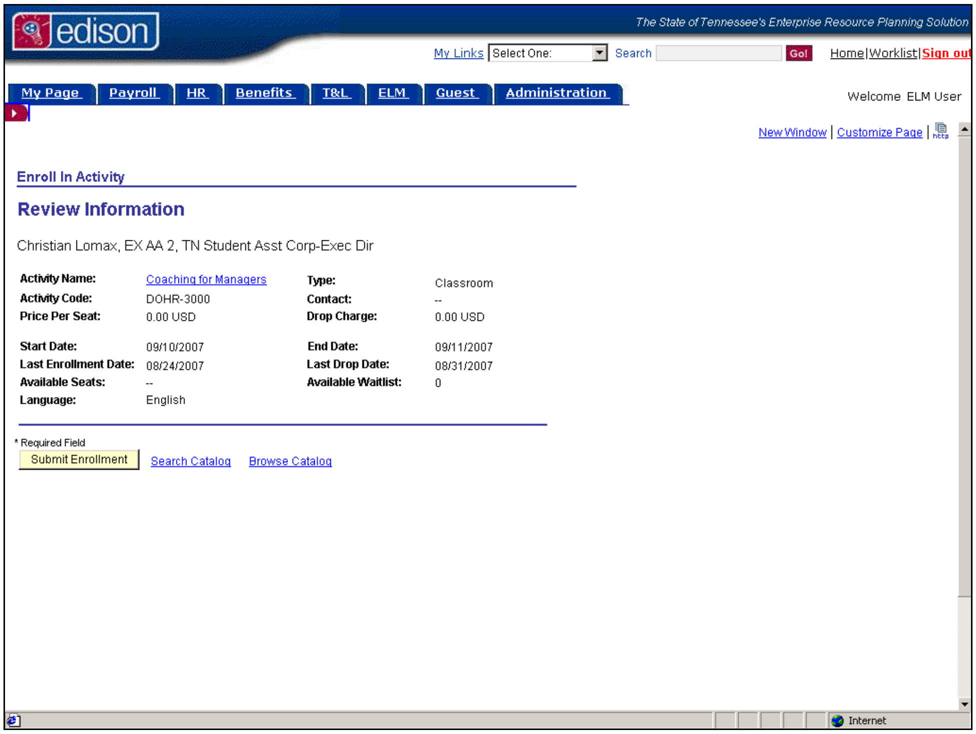
Step	Action
2.	Click the **Learning** link. Learning
3.	Click the **Search Catalog** link. Search Catalog



Step	Action
4.	Click the **Collapse** button to enlarge the screen.
5.	The **Search Catalog** page displays various criteria that you can use to search the list of all the classes offered. It will help in narrowing down the search results.
6.	Click the **Search** button to get the list of all the available courses or classes offered. Search
7.	The **Search Catalog** provides the list of all the available classes to choose from. It displays a brief description of the contents of every class and its type. Additionally, it provides an option to enroll in these courses.
8.	Click the **Coaching for Managers (PROD1000)** link to see the additional details about this course. Coaching for Managers (PROD1000)



Step	Action
9.	Click the **Enroll** button to enroll in this course. 
10.	This page allows the learner to review the details of the course before finally enrolling in it. The details include the **Activity Name, Code**, **Type**, **Price Per Seat**, **Start Date** and **End Date.**



Step	Action
11.	Click the **Submit Enrollment** button to submit your enrollment for approval. Submit Enrollment
12.	You have successfully completed searching the catalog and enrolling in an activity. **End of Procedure.**

Course Offerings - Browse the Catalog

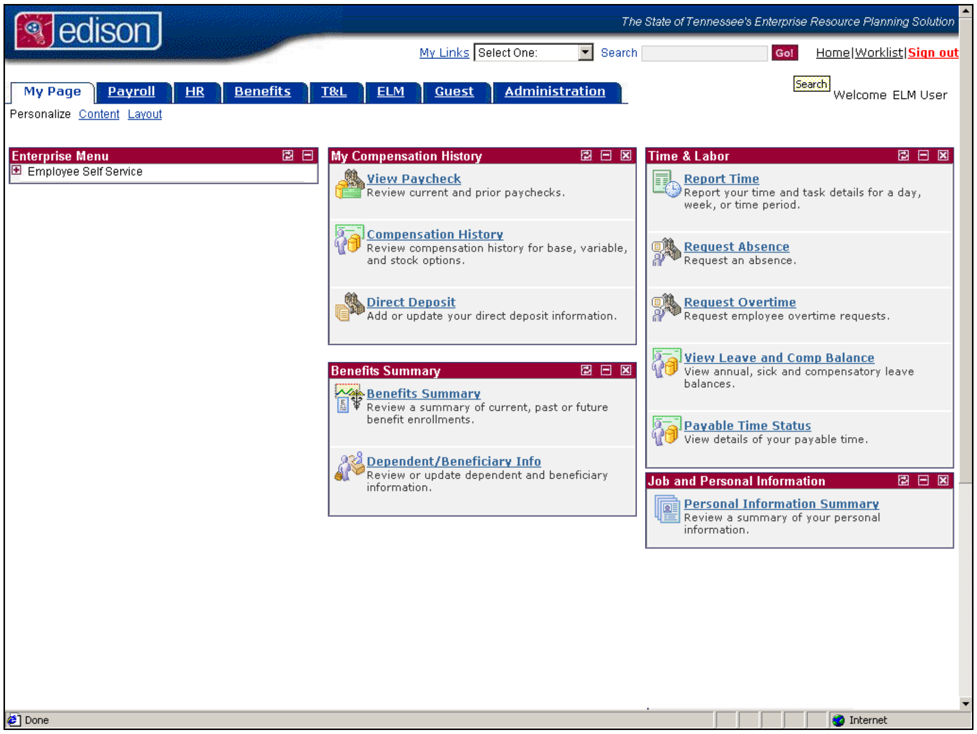
Edison will allow employees to browse the catalog using **Self Service**.

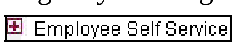
When employees browse the catalog, they are presented with the list of categories to which they have access, based on their learner group affiliations. By selecting a category, users can view a list of subcategories and the programs and catalog items offered within the selected category. The user can then enroll in an activity or add the item to his or her personal learning plan.

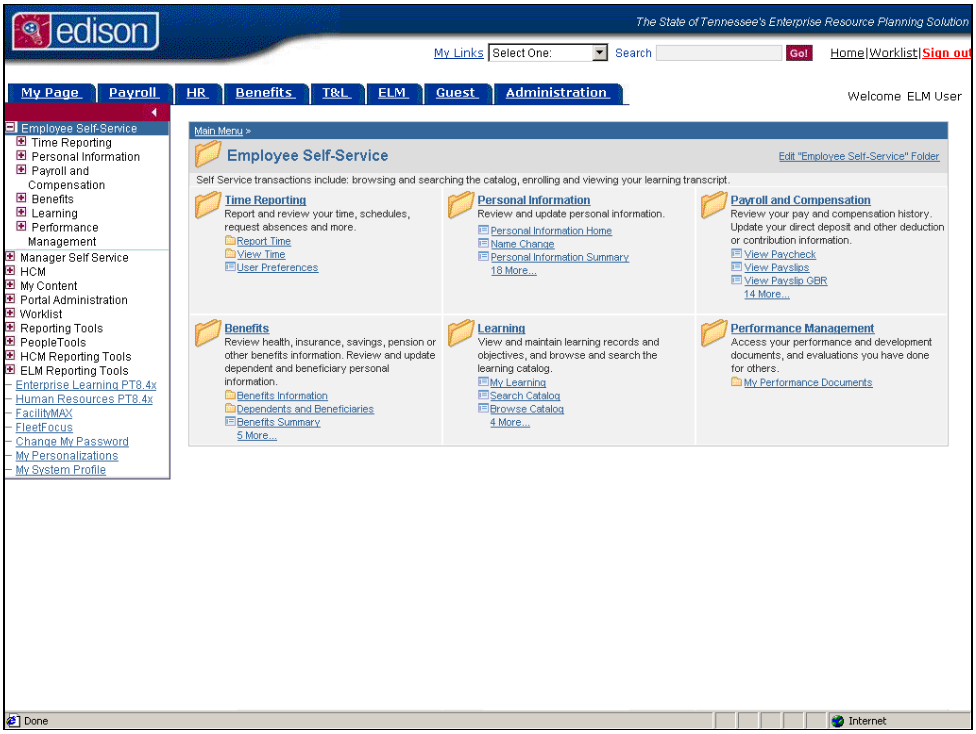
Procedure

In this lesson, you will learn to browse the catalog through the **Browse Catalog** component in order to select the desired activity and enroll in it.

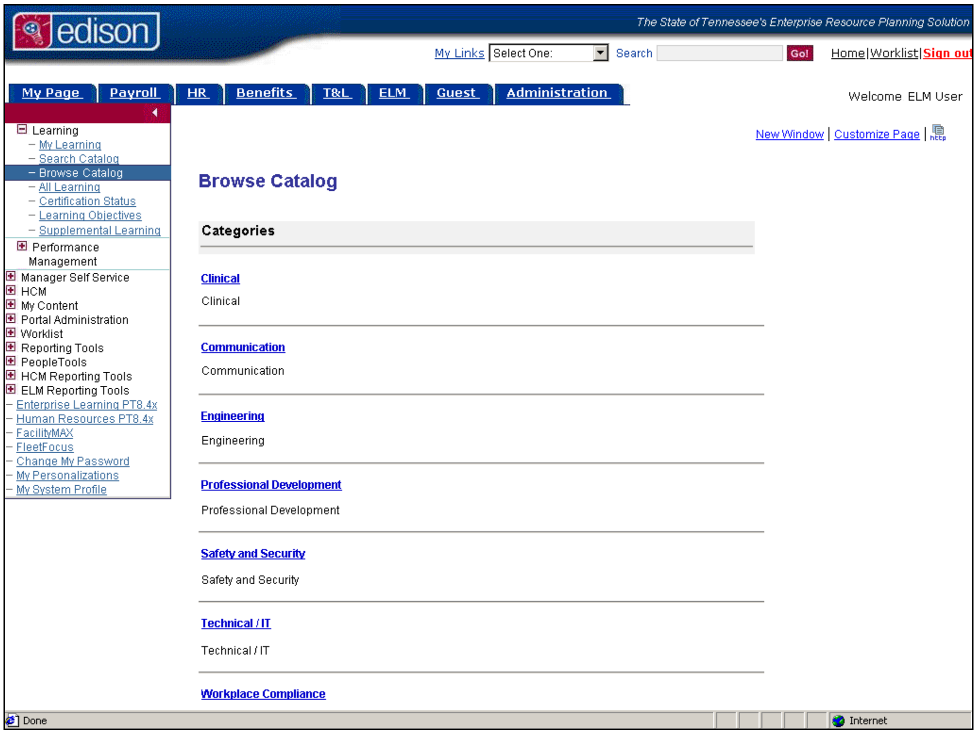
Christian Lomax will be used as an example in this lesson.



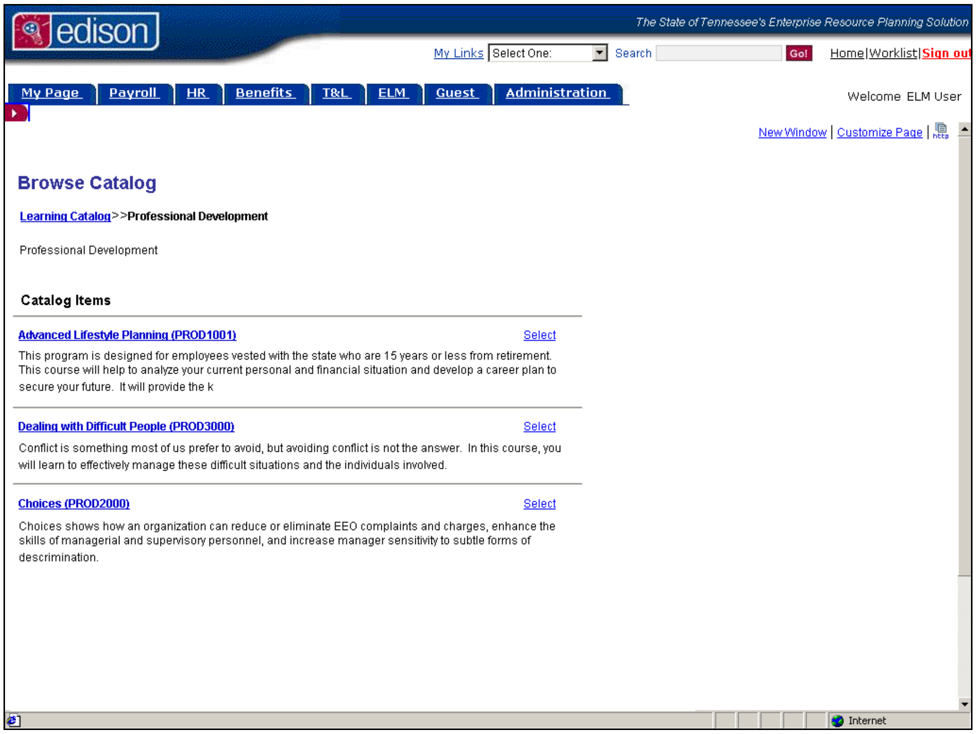
Step	Action
1.	Begin by clicking the **Employee Self Service** link. 



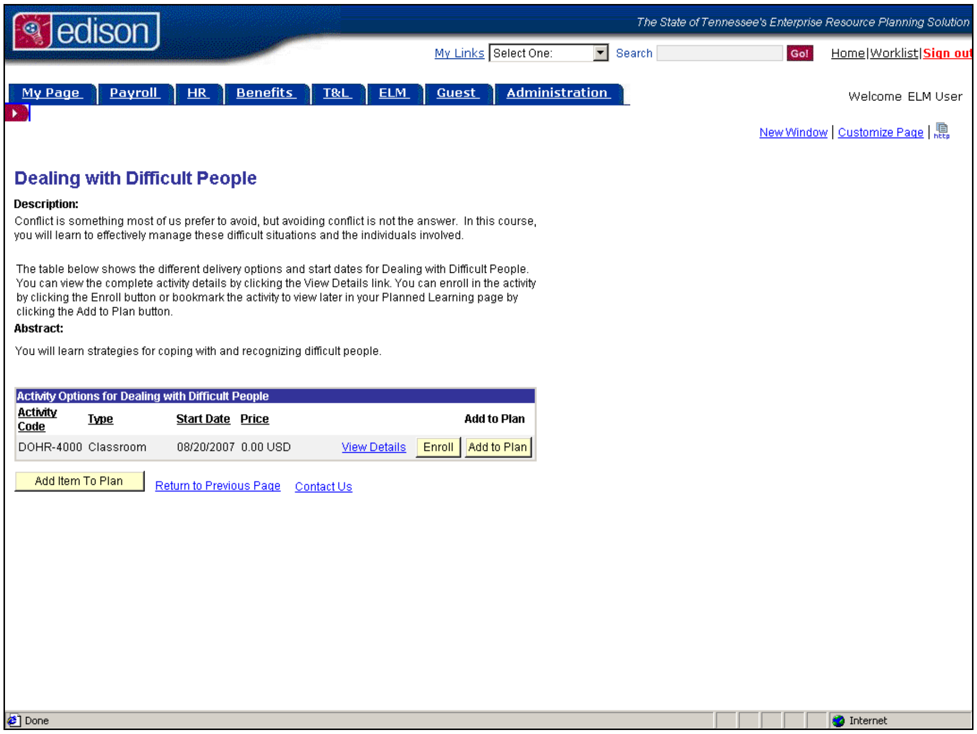
Step	Action
2.	Click the **Learning** link. Learning
3.	Click the **Browse Catalog** link. Browse Catalog



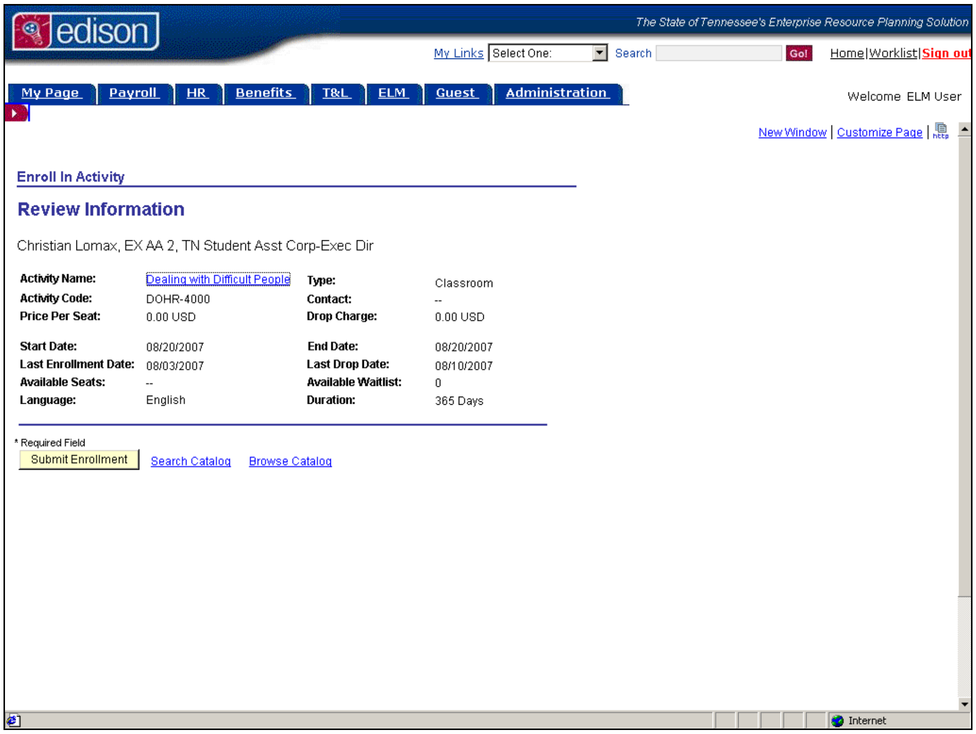
Step	Action
4.	Click the **Collapse** button to enlarge the screen.
5.	The **Browse Catalog** page displays the list of categories under which the activities fall. This provides an organized way to search for an activity.
6.	Click the scrollbar in order to see the information at the bottom of the page.
7.	Click the **Professional Development** link in order to see the activities listed under it. Professional Development
8.	The **Catalog Item** page provides a list of activities which fall under the **Professional Development** category. You can then choose the desired activity and enroll.



Step	Action
9.	Click the **Dealing with Difficult People (PROD3000)** link to see the more detailed information. Dealing with Difficult People (PROD3000)
10.	This activity page for **Dealing with Difficult People** provides a brief description about the activity, including the **Activity Code, Type, Start Date** and **Price.**



Step	Action
11.	Click the **Enroll** button in order to enroll in this activity. 
12.	The **Enroll in Activity** page allows you to review the information before submitting the enrollment.



Step	Action
13.	Click the **Submit Enrollment** button to submit your enrollment for approval. Submit Enrollment
14.	You have successfully browsed the catalog for an activity and enrolled in it. **End of Procedure.**

Certification - Check the Status

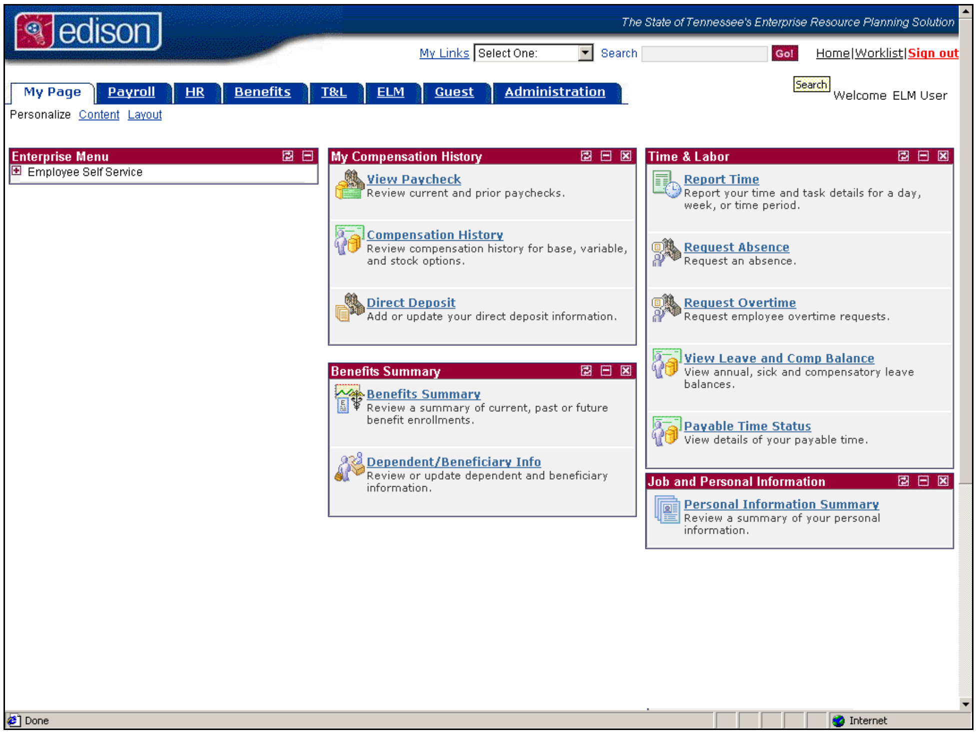
Edison allows employees to view their **Certification Status** using Self Service.

Employees can review their current and expired certifications within a specified date range. For each certification, they can view certification name, current status (whether certified or expired), expiration date, recertification date, and certification history. They also have the option to recertify by registering for a qualified recertification program.

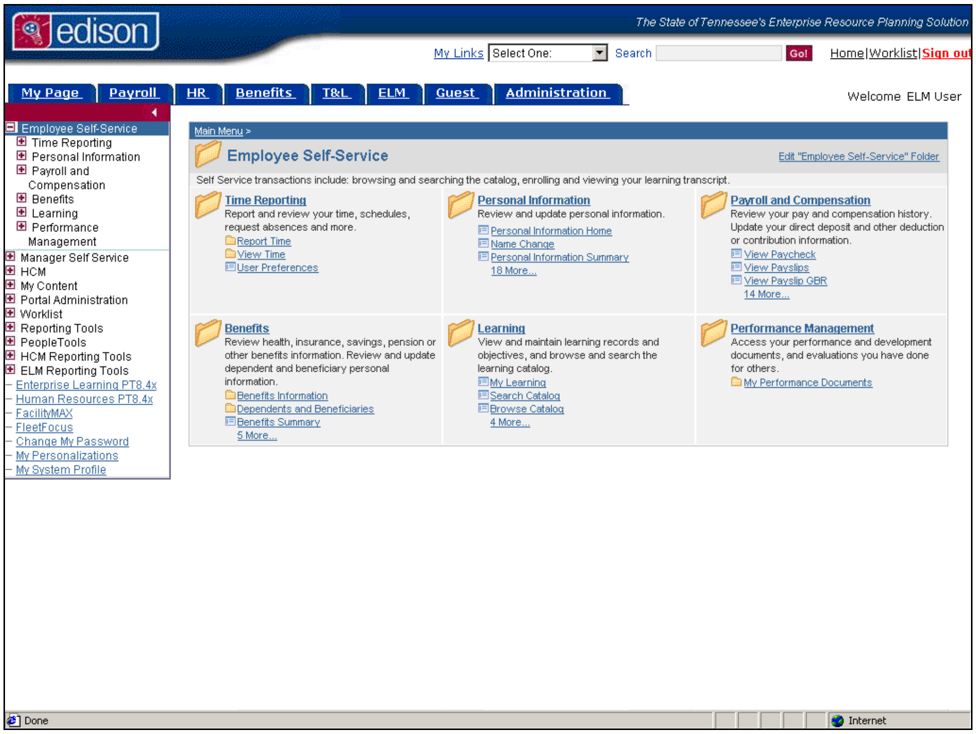
Procedure

In this lesson, you will learn to check your **Certification Status**.

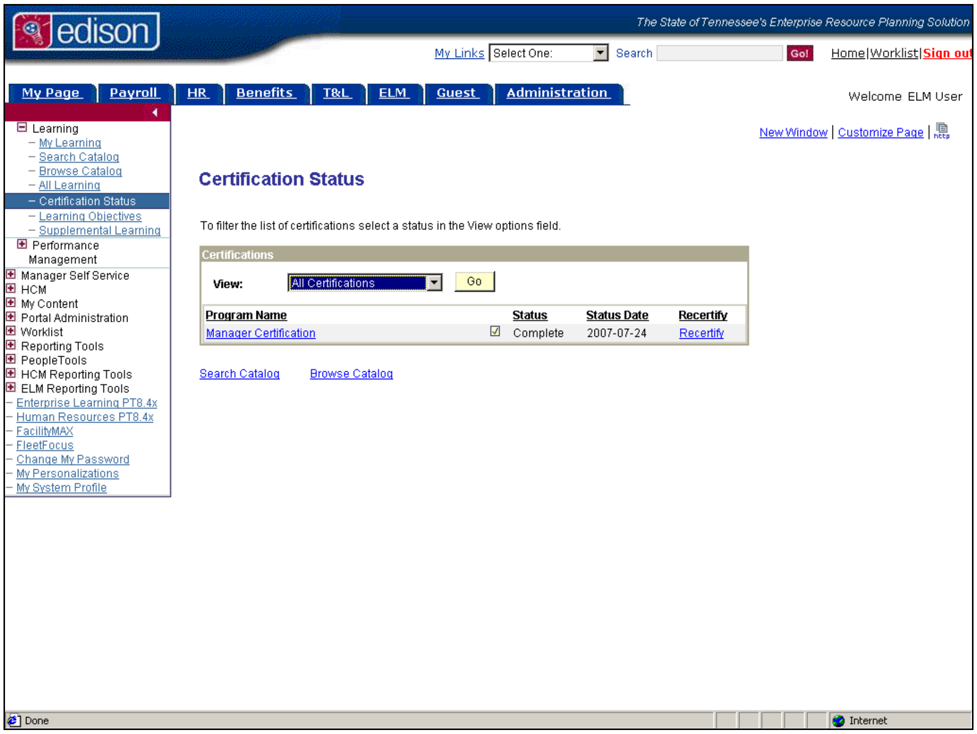
Christian Lomax will be used as an example in this lesson.



Step	Action
1.	Begin by clicking on the **Employee Self-Service** link. Employee Self Service



Step	Action
2.	Click the **Learning** link. Learning
3.	Click the **Certification Status** link. Certification Status



Step	Action
4.	Click the **Collapse** button to enlarge the screen.
5.	The **Certifications Status** page will list all the certifications received as of the current date.
6.	You can also view the list of certifications according to whether the certification is still valid, expired, or whether a warning has been issued. Click the **View** list. 
7.	You can then select the status that you would like to filter your results by.
8.	You have successfully completed viewing your **Certification Status**. **End of Procedure.**

Learning Objectives - View and Add

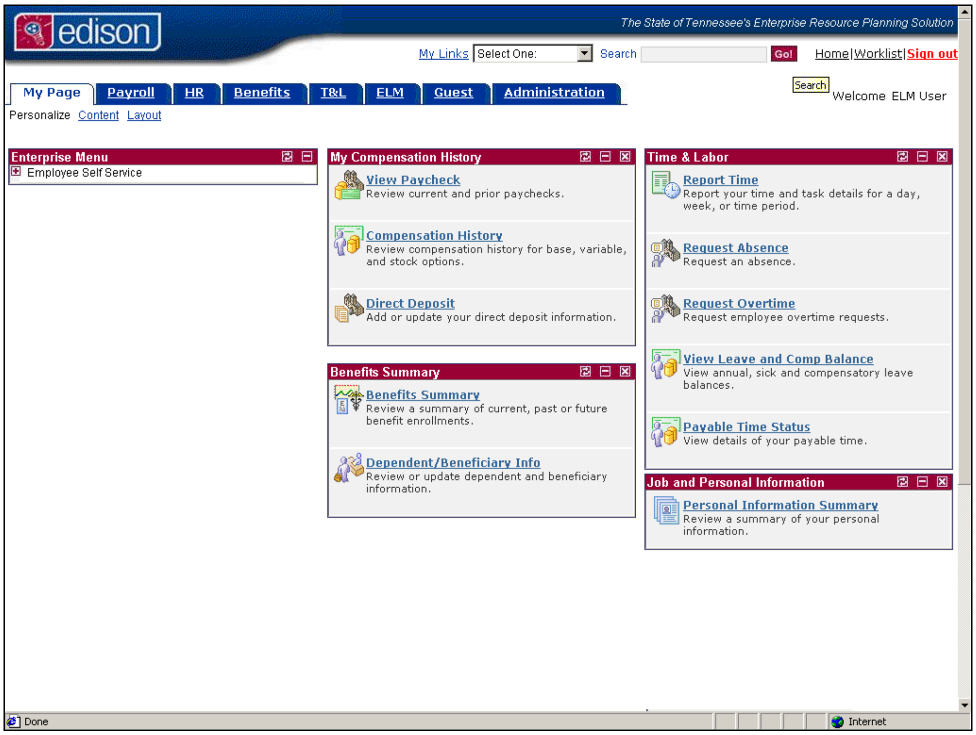
Edison allows employees to access their **Learning Objectives** information using Self Service.

Employees can search, select, and view their Current Learning Objectives. They can also see who has assigned an objective, add new objectives, search for activities that satisfy learning objectives, and view details of in-progress activities and programs that are linked to objectives.

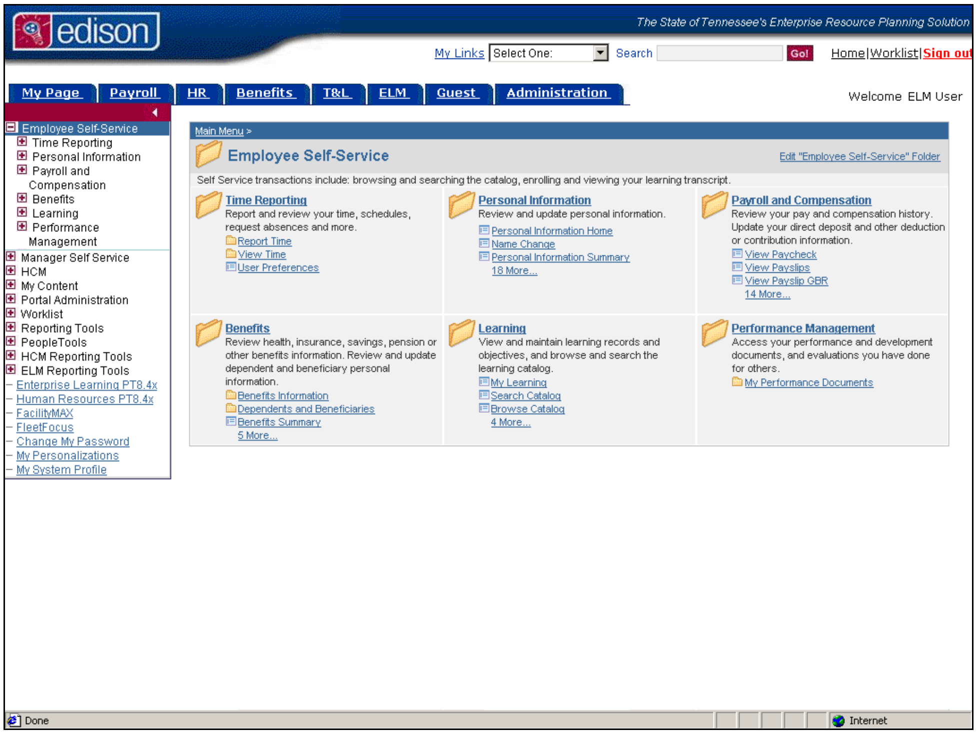
Procedure

In this lesson, you will learn to add your **Learning Objectives**.

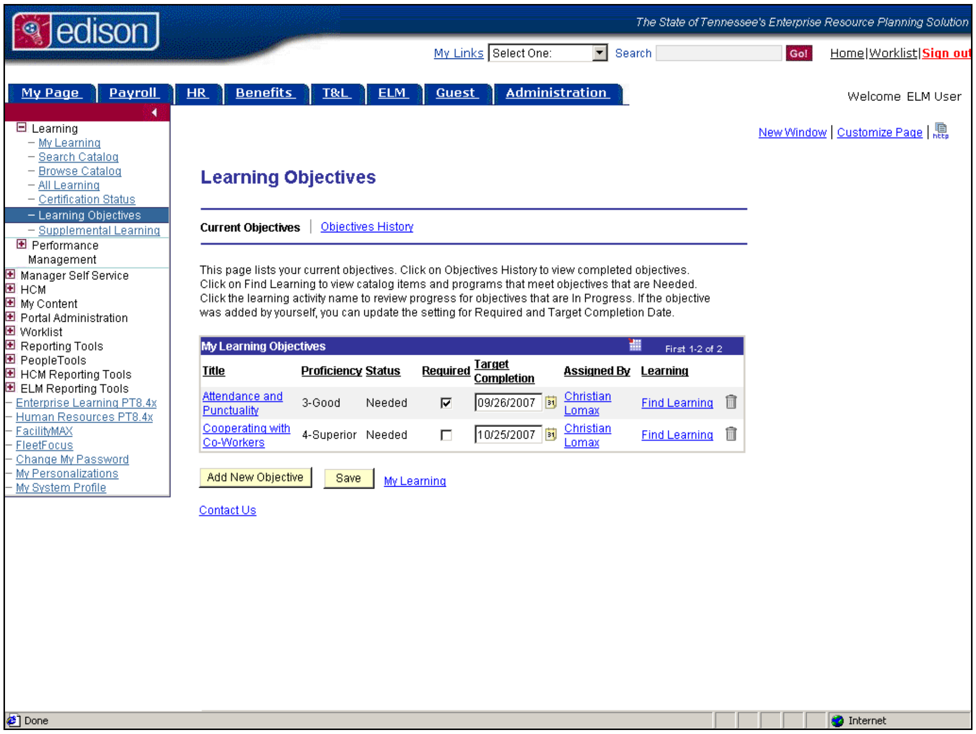
Christian Lomax will be used as an example in this lesson.

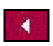
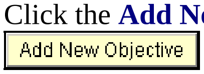


Step	Action
1.	Begin by clicking the **Employee Self-Service** link. Employee Self Service

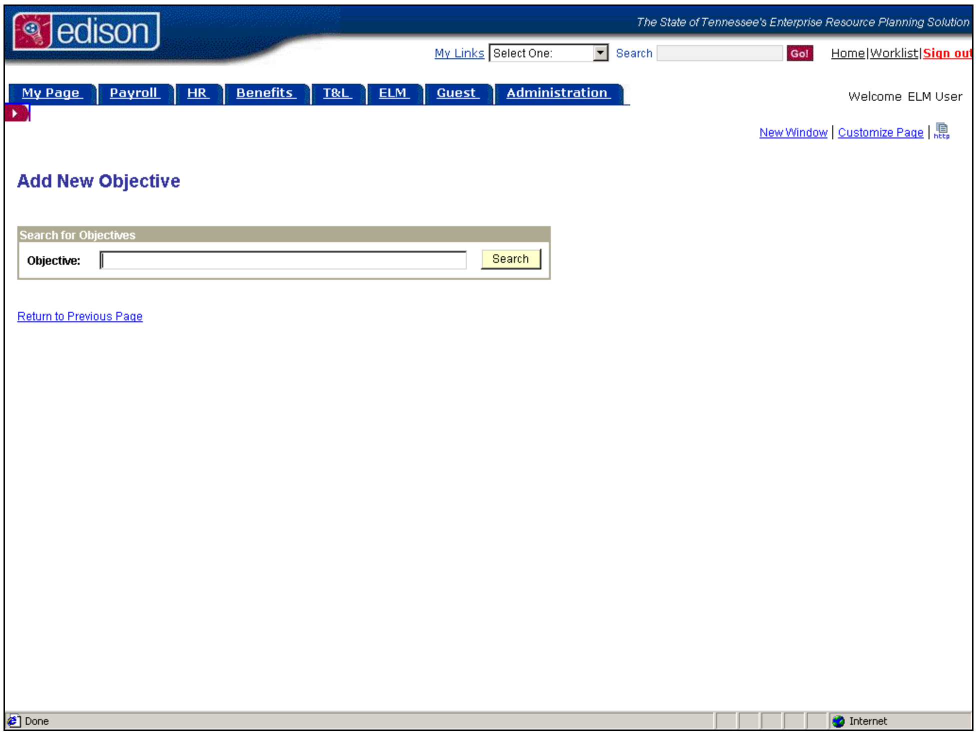


Step	Action
2.	Click the **Learning** link. Learning
3.	Click the **Learning Objectives** link. Learning Objectives



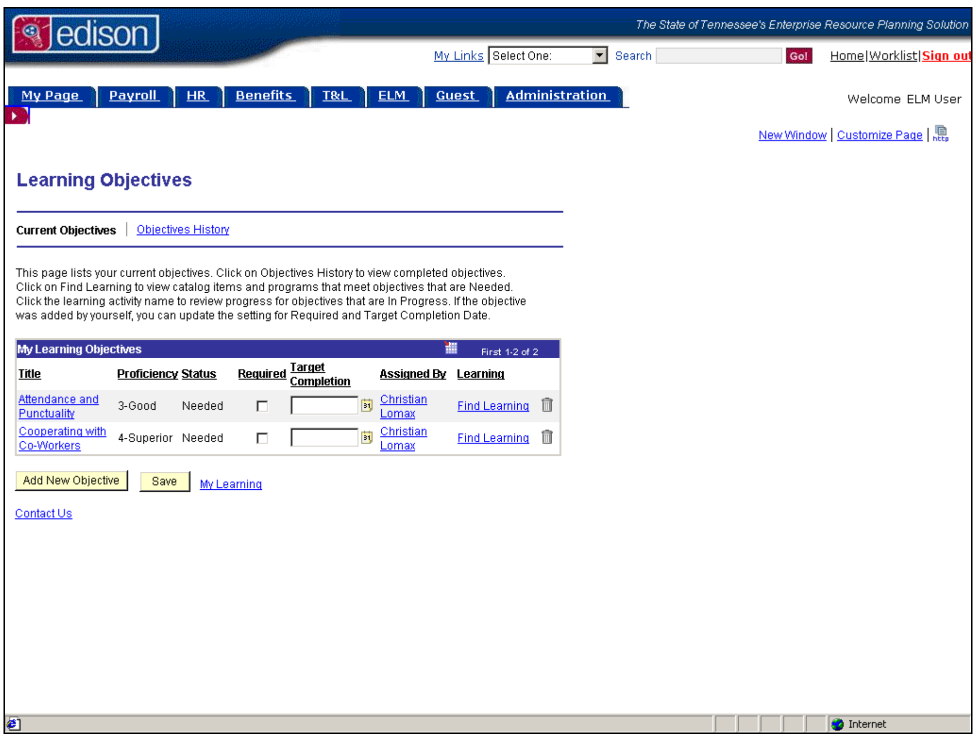
Step	Action
4.	Click the **Collapse** button to enlarge the screen. 
5.	Learning objectives enable you to target and recommend learning for an individual. When you set up learning objectives in Enterprise Learning Management: •Managers can assign objectives to team members, learners can self-assign objectives, and administrators can assign objectives to groups of learners. •Learners can search the catalog for activities and programs that meet specific objectives. •The system can track learner progress toward meeting objectives and maintain a history of each learner's met objectives. In this exercise, you will learn how to self-assign objectives.
6.	Click the **Add New Objective** button. 

Step	Action
7.	There are two ways in which you can search for and add objectives: 1. Type the partial or full name of the objective which you want to add and then click Search. 2. Click on Search to see the list of pre-defined objectives.



Step	Action
8.	Click the **Search** button in order to see the pre-defined list of objectives. Search
9.	The search results list the pre-defined objectives with the corresponding descriptions and proficiencies.
10.	Click the **Select** option.
11.	Click the **Proficiency** list.
12.	Click the **4-Superior** list item. 4-Superior

Step	Action
13.	Click the **Select** option.
14.	Click the **Proficiency** list.
15.	Click the **3-Good** list item. 3-Good
16.	Click the scrollbar to see the rest of the information.
17.	Click the **Add** button. Add
18.	The **Current Objectives** section displays a list of objectives that will now appear on your My Learning page under **My Learning Objectives**.



Step	Action
19.	Click the **Required** option.
20.	Click the **Calendar** icon for selecting the **Target Completion** button.

Step	Action
21.	Click the drop down list for selecting the desired month.
22.	Click the **September** list item.
23.	Click the **26** link.
24.	Click the **Calendar** icon for selecting the **Target Completion** button.
25.	Click the drop down list for selecting the desired month.
26.	Click the **October** list item.
27.	Click the **25** link.
28.	Click the **Save** button.
29.	You have successfully completed adding your **Learning Objectives**. **End of Procedure.**

Supplemental Learning - View and Add

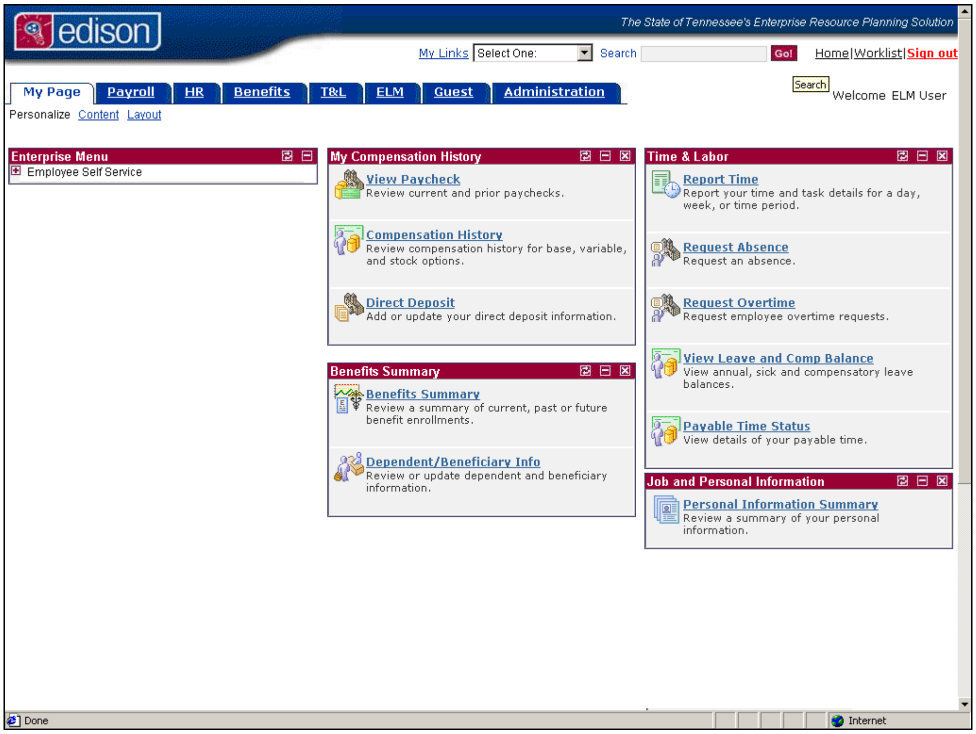
Edison allows employees to access their **Supplemental Learning** Activity using Self Service.

Employees can select the category of supplemental learning (external learning, equivalent experience, on-the-job training, and so on) that they need. They enter the details of a supplemental learning activity which complements or replaces learning offered in the catalog. Additionally, it also allows employees to specify the programs, activities, and objectives for which they should receive credit based on the supplemental learning.

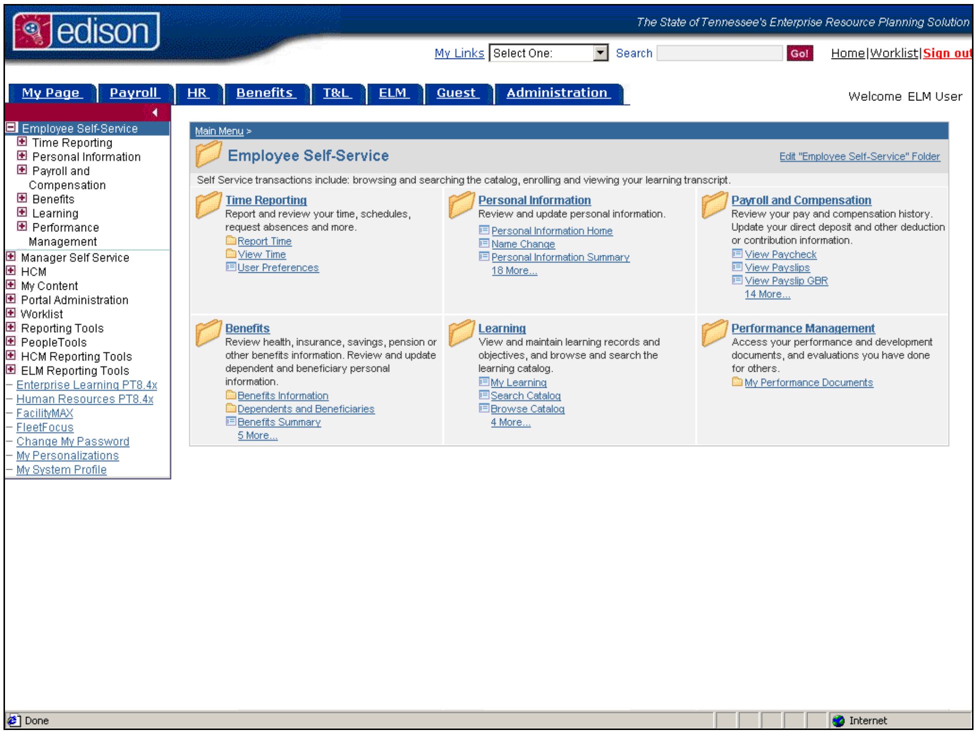
Procedure

In this lesson, you will learn to add **Supplemental Learning** activity details.

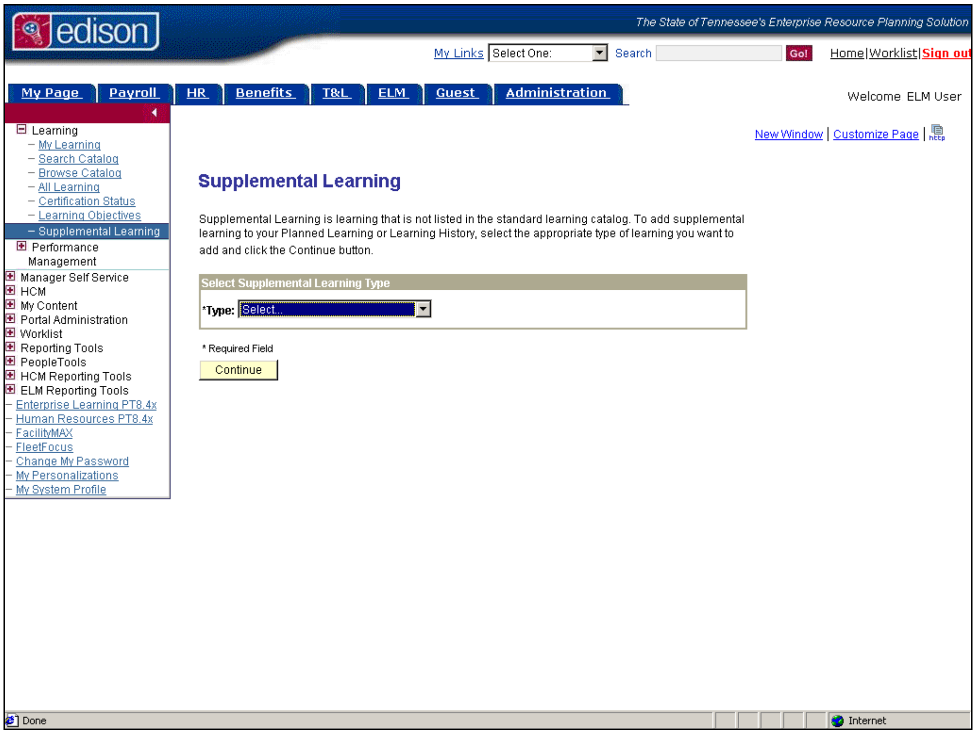
Christian Lomax will be used as an example in this lesson.



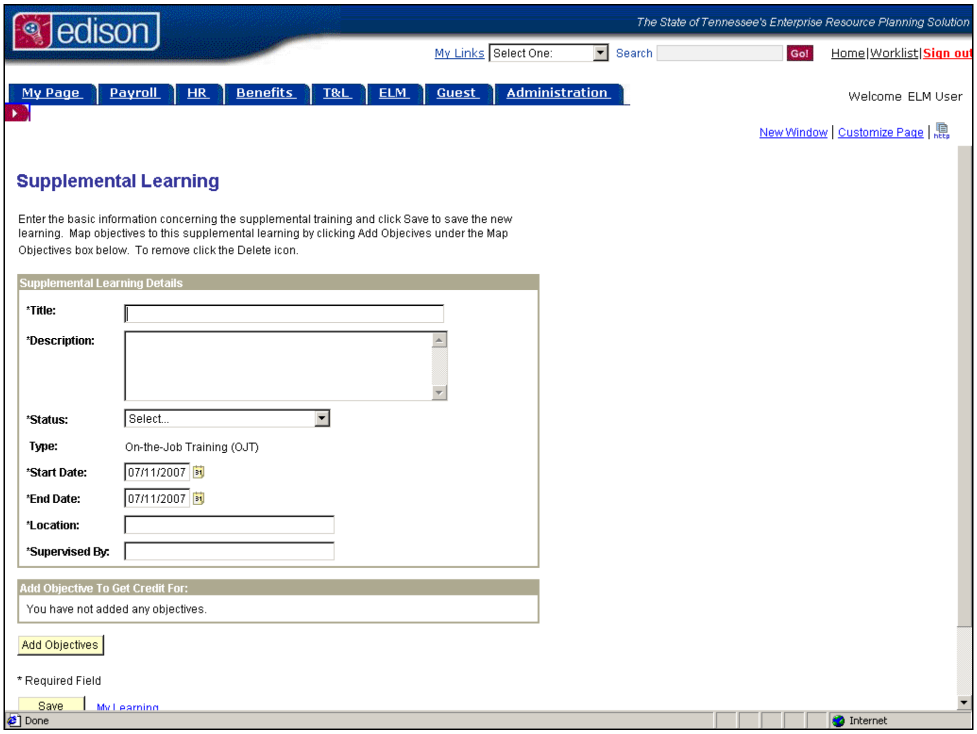
Step	Action
1.	Begin by clicking the **Employee Self-Service** link. 



Step	Action
2.	Click the **Learning** link. Learning
3.	Click the **Supplemental Learning** link. Supplemental Learning



Step	Action
4.	Click the **Collapse** button to enlarge the screen. 
5.	Click the **Type** list. Select...
6.	You can select one of the **Supplemental Learning** types depending on the category in which the topic falls.
7.	Click the **On-the-Job Training (OJT)** list item. On-the-Job Training (OJT)
8.	Click the **Continue** button. Continue
9.	The **Supplemental Learning Details** page displays details such as **Title** (name of the Supplemental Learning activity), **Description** (a brief explanation of the Supplemental Learning activity), **Status**, **Type** (category in which the Supplemental Learning falls), **Start** and **End** Date (duration of the activity), **Location**, and **Supervised By**.



Step	Action
10.	Click in the **Title** field.
11.	Enter "**Work Ethics**" into the **Title** field.
12.	Click in the **Description** field.
13.	Enter "**This class will guide the employees to maintain a better workplace.**" into the **Description** field.
14.	Click the **Status** drop down list. Select...
15.	Click the **Submit For Approval** list item. This will workflow to the manager. Submit For Approval
16.	Click the **Calendar** icon to choose a data as a **Start Date**.
17.	Click the drop down list to select desired month.
18.	Click the **September** list item. September
19.	Click the **18** link. 18
20.	Click the calendar icon to choose a date as an **End Date**.

Step	Action
21.	Click the drop down list to select desired month.
22.	Click the **September** list item. September
23.	Click the **18** link. 18
24.	Click in the **Location** field.
25.	Enter "**Office Room Nos. 1087**" into the **Location** field.
26.	Click in the **Supervised By** field.
27.	Enter "**Judy Miller**" into the **Supervised By** field.
28.	Click the **Save** button. Save
29.	You have successfully completed adding a **Supplemental Learning Activity**. **End of Procedure.**

My Travel

Expense Report - Create

Expense Reports detail expenses incurred while traveling. This process can be the first document in the reimbursement process or after a travel authorization is created for out of State travel.

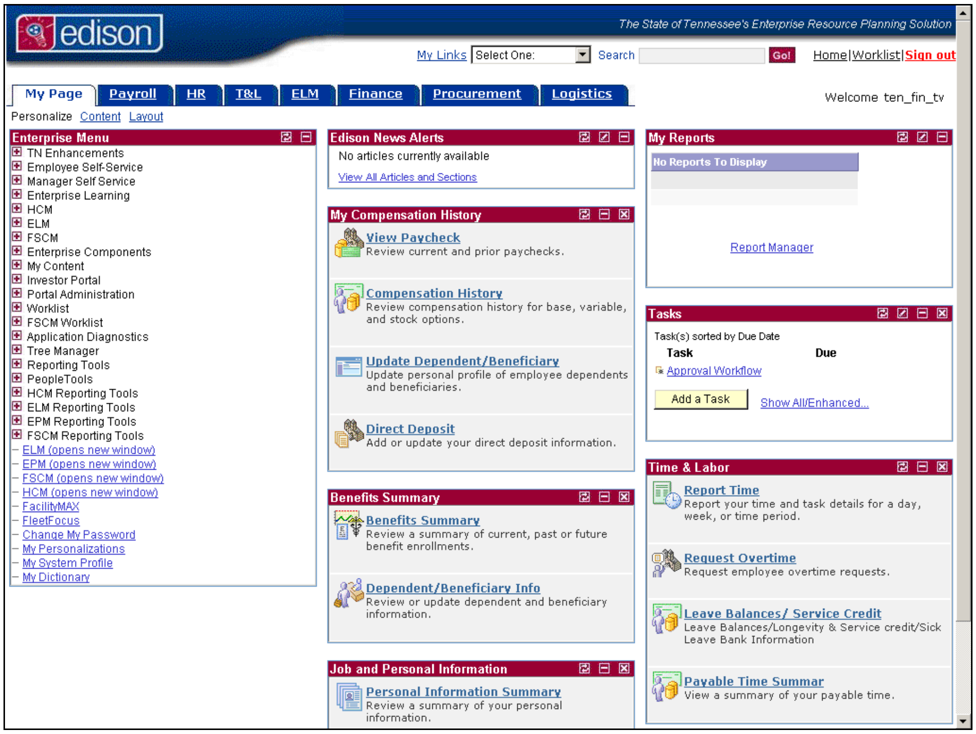
According to IRS rule, expense reimbursements become taxable income after 60 days. The State of Tennessee will be enforcing this rule. Employees are strongly encouraged to submit expense report within 30 days of travel date.

Per the State of Tennessee travel policy, the first and last day of using the expense type of *In State Meals & Incidentals* is to reimburse only 75% of the CONUS rate. Although Edison will automatically populate with the full rate the amount must be changed to reflect the policy.

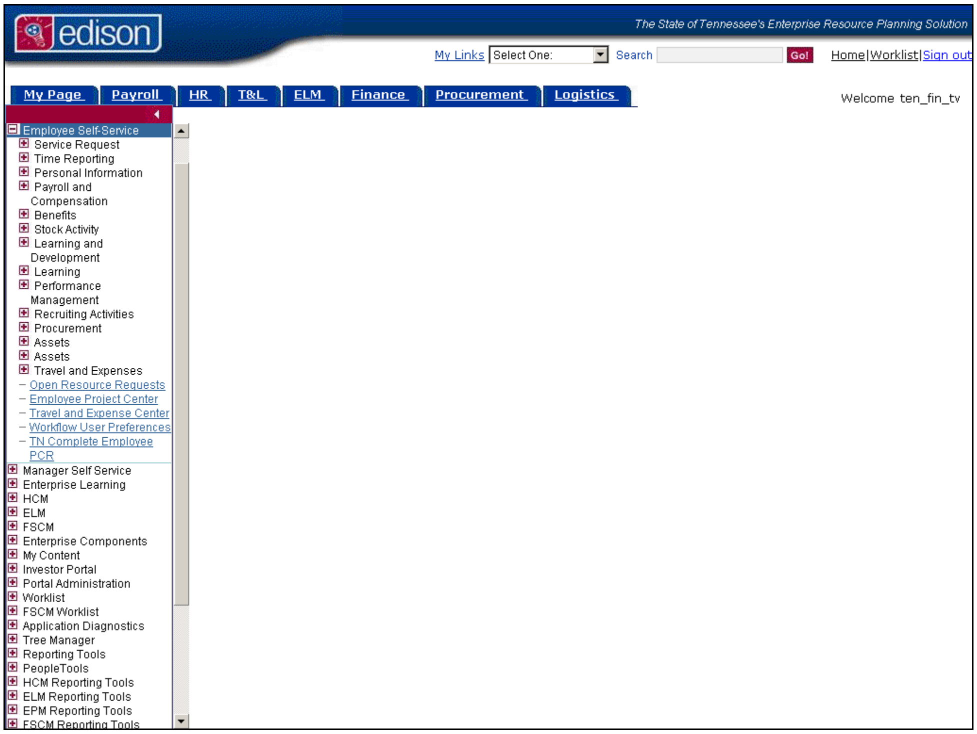
Note: When an employee enters an expense type of Lodging or Meals & Incidentals, the system will populate in the per diem rate. These are the Federal Domestic per diem rates for the continental United States (CONUS). An employee can submit an amount higher than the CONUS rate (i.e., conference rates), but the system will produce a warning that the amount entered exceeds the CONUS rate. The employee will then be prompted for an explanation for the approver to review.

Procedure

Imagine you are employee John User. You recently traveled to Nashville for training. You wish to submit an expense report for the incurred expenses.

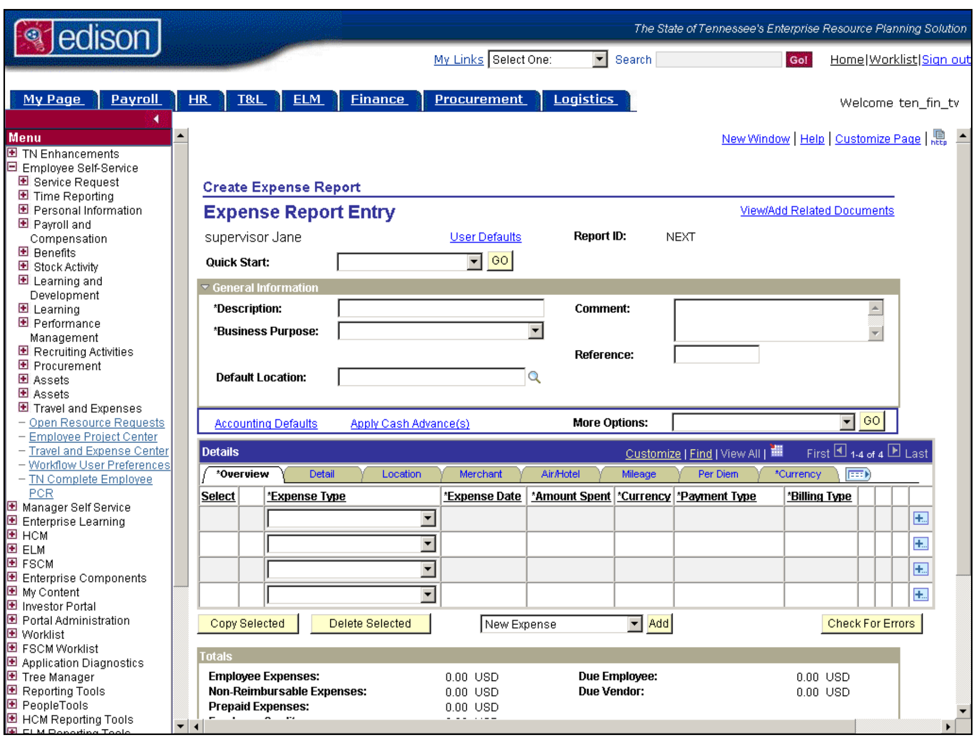


Step	Action
1.	Click the **Employee Self-Service** link. 



Step	Action
2.	Click the **Travel and Expense Center** link. Travel and Expense Center
3.	Click the **Expense Report** link. Expense Report
4.	Click the **Create** link. Create
5.	The **Expense Report Entry** page enables you to easily add expense lines and provide general information as well as other details that are specific for expense types.

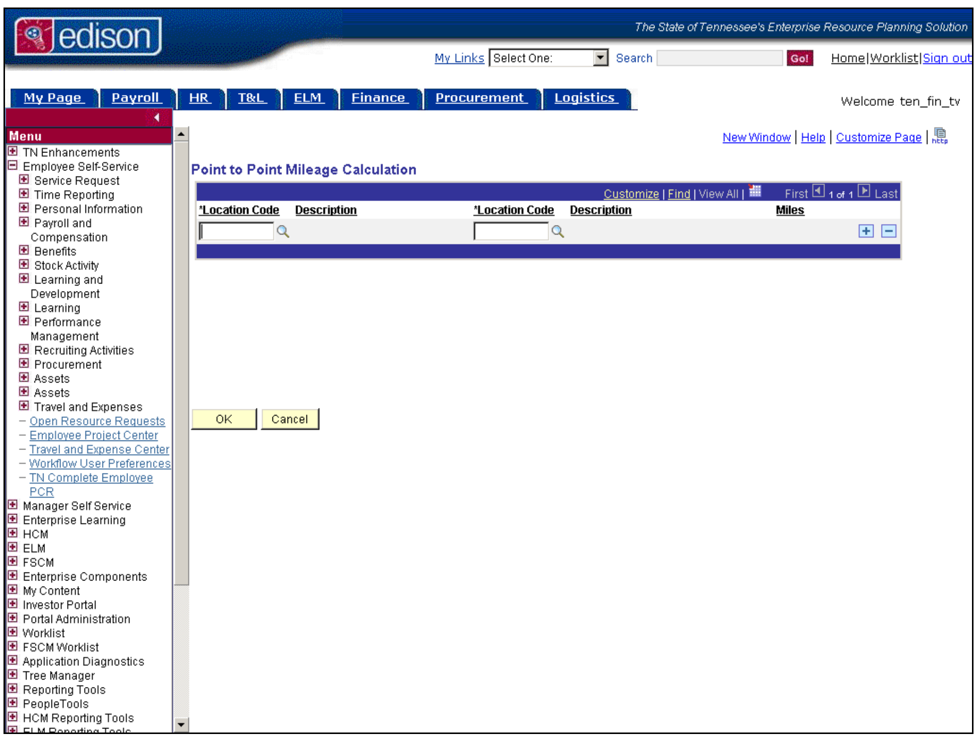
Step	Action
6.	When you create an expense report, you have the options on which to base the document by using the **Quick Start** list. The selection that you make triggers other choices that prompt you for details about the expense report. The creation options are: • **Blank Report** • **Template** • **Travel Authorization** • **Existing Report** A **Blank Report** is completely blank and all values must be **manually** entered. A **Template** allows you to pull a previously created expense template that is pre-populated with expense types, a location, monetary values (etc..). A **Travel Authorization** allows users to copy an approved TA for a specific trip. An **Existing Report** allows users to copy an existing report to a new report. For purposes of this example, we will use a **Blank Report**.



Step	Action
7.	Click the **Quick Start** list.
8.	Click "**A Blank Report**". A Blank Report
9.	Click the **GO** button. GO
10.	The **Description** field is used to identify the expense report. Click in the **Description** field.
11.	Enter the desired information into the **Description** field. Enter "**Training in Nashville**".
12.	Use the **Business Purpose** field to select from a predefined list of purposes. Click the **Business Purpose** list.
13.	Use the navigation bar to scroll to the bottom of the list.
14.	Click "**State Training**". State Training
15.	You can enter additional information about the expense report in the **Comment** field. Click in the **Comment** field.
16.	Enter the desired information into the **Comment** field. Enter "**Annual Training**".
17.	**Edison** uses what you enter in the **Default Location** field to automatically populate the expense location when you enter an expense type. This will be the city, country or geographical area that you are traveling to. Click the **Look up Default Location** button.
18.	Use the **Look Up Default Location** page to find your Default Location. Click in the **begins with** field.

Step	Action
19.	Enter the desired information into the **begins with** field. Enter "**TN**" **Note**: The entry format of the expense location is the State abbreviation and the first 3 letters of the location description. Five letters maximum.
20.	Click the **Look Up** button. Look Up
21.	Click "**TNNAS**". TNNAS
22.	Use the **Details** section to identify travel expenses.
23.	Select an expense type to add an expense item. Click the **Expense Type** list.
24.	Use the navigation bar to scroll to the bottom of the list.
25.	Click "**In State Point to Point Miles**". In State Point to Point Miles
26.	Click in the **Expense Date** field.
27.	Enter the desired information into the **Expense Date** field. Enter "**12/01/2007**".
28.	Use the **Payment Type** field to enter how you paid for the expense, such as with a credit card or cash. Click the **Payment Type** list.
29.	Click "**Cash**". Cash
30.	Click the **Billing Type** list. Standard
31.	Click "**Standard**". Standard
32.	You are required to provide additional information about the **In State Point to Point** expense type. You can do this by clicking on the **Mileage** tab. Click the **Mileage** tab. *Mileage

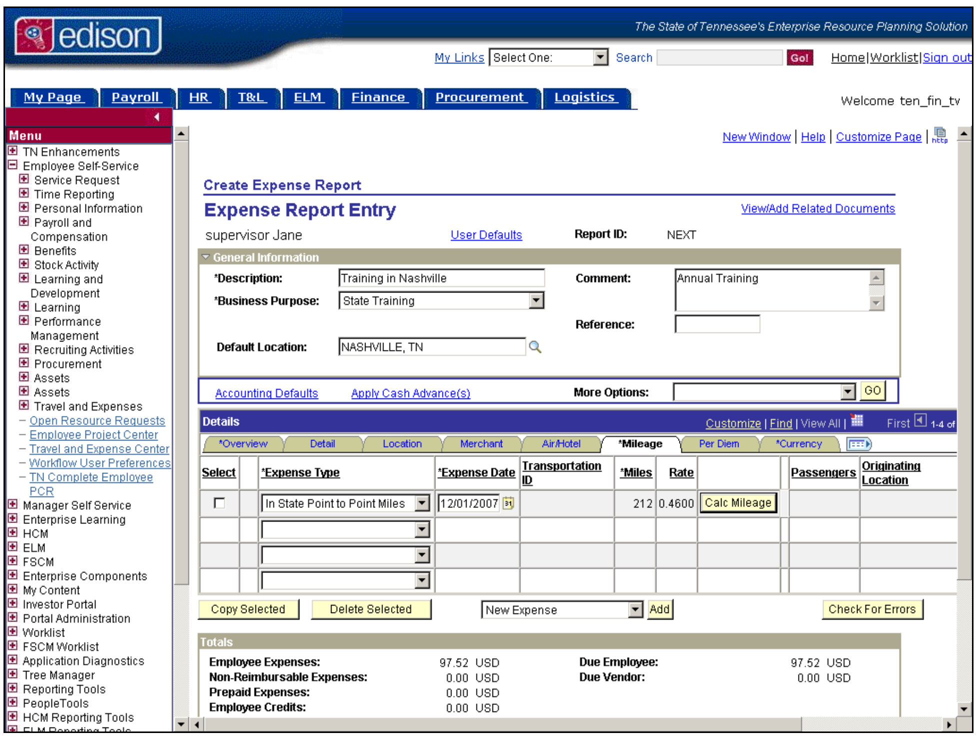
Step	Action
33.	The **Mileage** tab is used to automatically calculate the mileage rate that will be applied to the **Expense Report**. Mileage rates are based on the State Travel Regulation.
34.	The **Expense Type** and **Date** information populates in from the **Overview** tab.
35.	You can calculate the mileage costs by selecting the **Calc Mileage** button. Click the **Calc Mileage** button. Calc Mileage
36.	Use the **Point to Point Mileage Calculation** page to enter the origination and destination location(s) of the trip.



Step	Action
37.	The originating location may default in your base location. If not, you will need to enter your originating location. For purposes of this example, you will need to enter your originating location. Click the **Look Up Location Code** button.

Step	Action
38.	The locations are listed by **Location Code**. You can search for the location by **Location Code** or **Description** of the location. Click the **Search by** list. Location Code
39.	You may find it easier to use the **Description** option when searching for a location. Click "**Description**". Description
40.	Click in the **begins with** field.
41.	Use the **Description** field to enter the location. Enter the desired information into the **begins with** field. Enter "**Memphis**".
42.	Click the **Look Up** button. Look Up
43.	Notice the results all contain "**Memphis**". You must choose which **Description** matches your location.
44.	Click "**Memphis SHELBY, TENNESSEE**". Memphis SHELBY, TENNESSEE
45.	Now you will choose your destination location. Click the **Look Up Location Code** button.
46.	Follow the same steps you performed when choosing your originating location.
47.	Click the **Search by** list. Location Code
48.	Click "**Description**". Description
49.	Click in the **begins with** field.
50.	Enter the desired information into the **begins with** field. Enter "**Nashville**".
51.	Click the **Look Up** button. Look Up
52.	Click "**Nashville DAVIDSON, TENNESSEE**". Nashville DAVIDSON, TENNESSEE

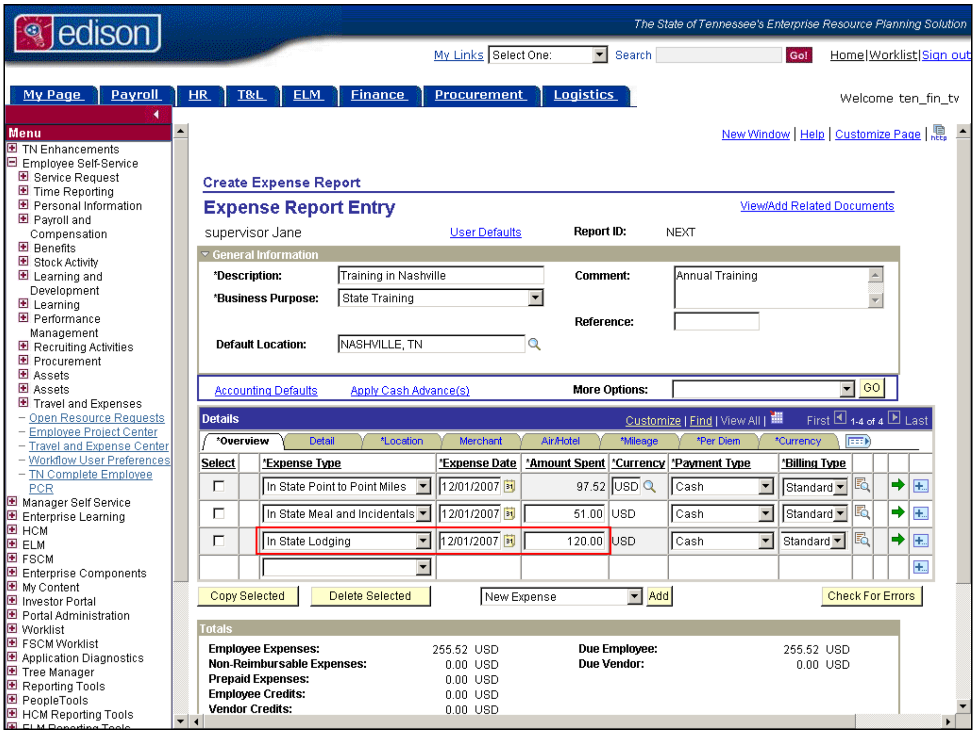
Step	Action
53.	Notice the **Miles** have been populated. This amount will be used to calculate the mileage costs.
54.	Click the **OK** button. OK
55.	Use the tabs in the **Details** section to enter additional information about the expenses reported. In this example, you will use the **Detail** tab to enter information about the mileage expense.



Step	Action
56.	Click the **Detail** tab. Detail
57.	Use the **Description** field to enter free form text related to the expense line. Click in the **Description** field.

Step	Action
58.	Enter the desired information into the **Description** field. Enter "**Mileage from Memphis to Nashville**".
59.	Once you have entered all of the information you would like to provide, navigate to the **Overview** tab to continue entering the remainder of your expenses. Click the **Overview** tab. *Overview
60.	Notice the system automatically calculated the mileage amount based upon the locations you entered on the **Mileage** tab. **Note**: This amount cannot be edited.
61.	Click the **Expense Type** list.
62.	Use the navigation bar to scroll to the bottom of the list.
63.	Click "**In State Meal and Incidentals**". In State Meal and Incidentals
64.	Click in the **Expense Date** field. 12/01/2007
65.	Enter the desired information into the **Expense Date** field. Enter "**12/01/2007**".
66.	Notice the **Amount Spent** field populates in with the per diem rate. These are the CONUS rates established by General Services Administration (GSA). The per diem rates will populate when choosing expense types of **Lodging** or **Meals & Incidentals**. If an employee attempts to enter an amount higher than the per diem, the system will produce a warning before you are allowed to submit the expense report. An explanation must be entered before preceding further. **Note**: The **Amount Spent** field should be adjusted if the actual expense was less than the per diem.
67.	Click the **Payment Type** list.
68.	Click "**Cash**". Cash
69.	Click the **Billing Type** list. Standard

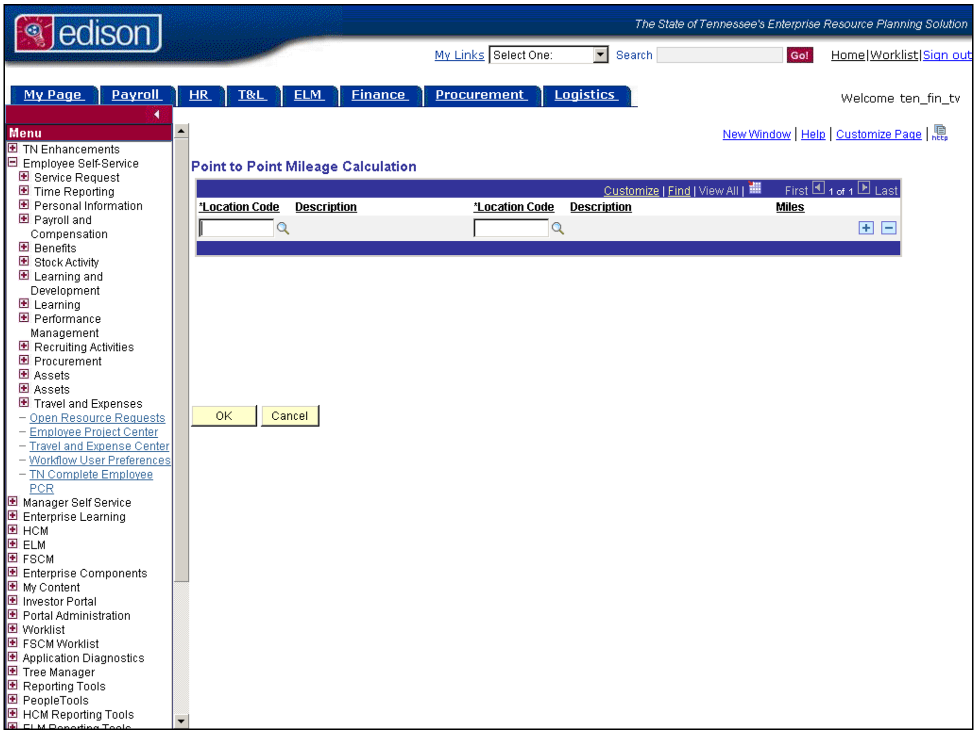
Step	Action
70.	Click "**Standard**". Standard
71.	Click the **Expense Type** list.
72.	Click "**In State Lodging**". In State Lodging
73.	Click in the **Expense Date** field. 12/01/2007
74.	Enter the desired information into the **Expense Date** field. Enter "**12/01/2007**".
75.	Notice the **Amount Spent** field populates in with the per diem rate. These are the CONUS rates established by General Services Administration (GSA). The per diem rates will populate when choosing expense types of **Lodging** or **Meals & Incidentals**. If an employee attempts to enter an amount higher than the per diem, the system will produce a warning before you are allowed to submit the expense report. An explanation must be entered before preceding further. **Note**: The **Amount Spent** field should be adjusted if the actual expense was less than the per diem.
76.	The hotel you stayed at charged higher rates than the per diem rate. You will enter this amount in the **Amount Spent** field to indicate the lodging expenses incurred. **Edison** will produce a warning prior to submission of the report.
77.	Click in the **Amount Spent** field. 107.00
78.	Enter the desired information into the **Amount Spent** field. Enter "**120.00**".
79.	Click the **Payment Type** list.
80.	Click "**Cash**". Cash
81.	Click the **Billing Type** list. Standard
82.	Click "**Standard**". Standard



Step	Action
83.	**NOTE:** This rate does not include hotel taxes. To enter hotel tax, add a new row and use the **Expense Type** of "**Hotel Taxes**".
84.	Next, you will enter vicinity miles using the ***Expense Type** of **In State Vicinity Miles**. The **Point to Point** mileage is different than **Vicinity** mileage: - **Vicinity** mileage is the number of miles that an employee travels in a particular city for work activities. - **Point to Point** mileage is the number of miles between two cities that an employee drives for work activities.
85.	Click the **Expense Type** list. 
86.	Use the navigation bar to scroll to the bottom of the list.
87.	Click "**In State Vicinity Miles**". 
88.	Click in the **Expense Date** field. 
89.	Enter the desired information into the **Expense Date** field. Enter "**12/01/2007**".

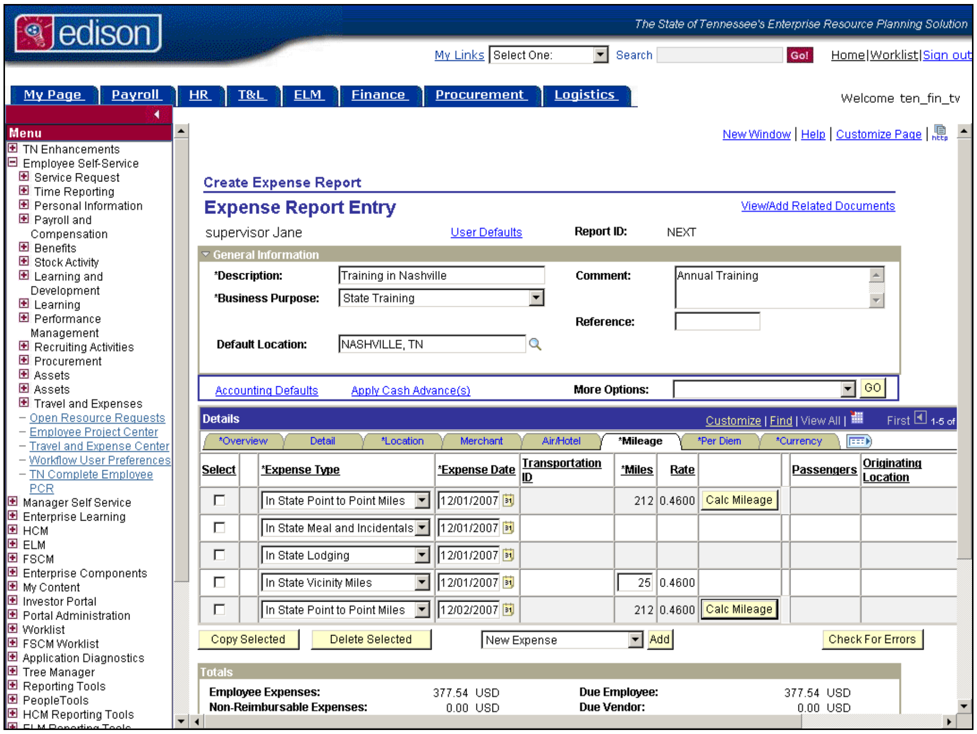
Step	Action
90.	Click the **Payment Type** list.
91.	Click "**Cash**". Cash
92.	Click the **Billing Type** list. Standard
93.	Click "**Standard**". Standard
94.	You will need to access the ***Mileage** tab to enter the Vicinity miles. Click the **Mileage** tab. *Mileage
95.	Click in the **Miles** field.
96.	Enter the desired information into the **Miles** field. Enter "**25**".
97.	Click the **Overview** tab. *Overview
98.	Notice the system automatically calculated the mileage amount based upon the number of vicinity miles entered at the ***Mileage** tab.
99.	You need to add an expense line for the return mileage to the origination location. You will use the **New Expense** field to accomplish this task.
100.	Click the **New Expenses** list. New Expense
101.	You have the option to add **Multiple Expenses** at one time or a single **New Expense**. Click "**New Expense**" . New Expense
102.	Click the **Add** button. Add
103.	Notice an additional line appears to add an expense type.
104.	Click the **Expense Type** list.
105.	Use the navigation bar to scroll to the bottom of the list.
106.	Click the "**In State Point to Point Miles**" list item. In State Point to Point Miles

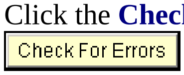
Step	Action
107.	Click in the **Expense Date** field. 12/01/2007
108.	Enter the desired information into the **Expense Date** field. Enter "**12/02/2007**".
109.	Click the **Payment Type** list.
110.	Click"**Cash**". Cash
111.	Click the **Billing Type** list. Standard
112.	Click "**Standard**". Standard
113.	You are required to enter additional information about the **In State Point to Point** expense. You will follow the same process as you did earlier by entering **In State Point to Point** expense information. However, this time you will enter the mileage for the return trip.
114.	Click the **Mileage** tab. *Mileage
115.	You will indicate the **Point to Point Mileage** detail for the new expense.
116.	Click the **Calc Mileage** button. Calc Mileage



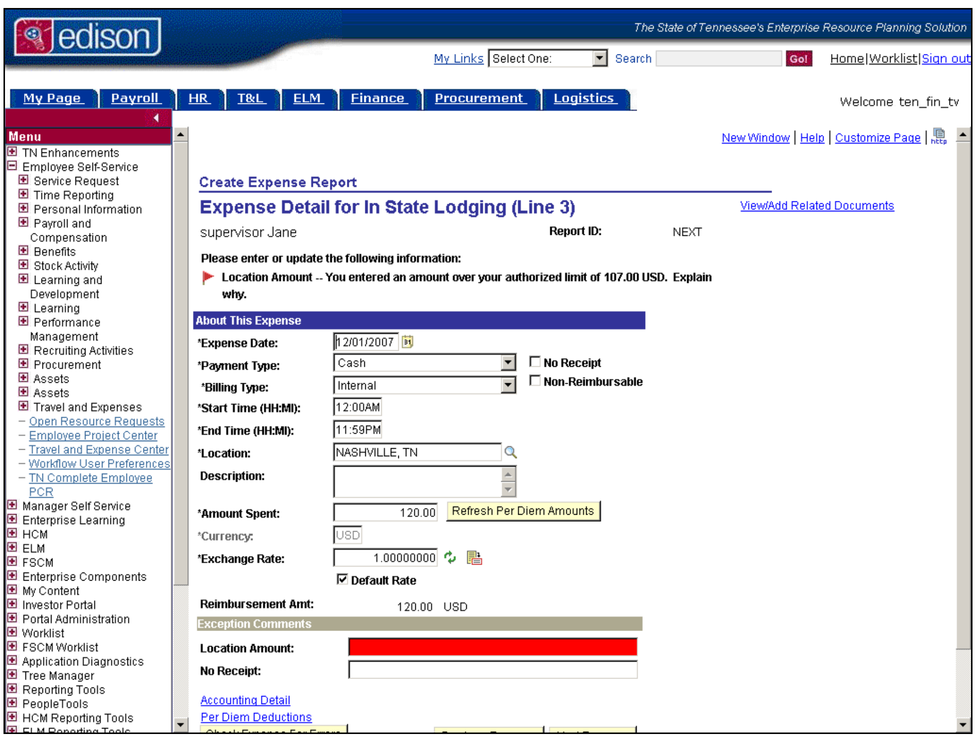
Step	Action
117.	You will first need to enter your source location of the return trip. Click the **Look Up Location Code** button. 
118.	Click the **Search by** list. Location Code
119.	You may find it easier to use the **Description** option when searching for a location. Click "**Description**". Description
120.	Click in the **begins with** field.
121.	Enter the desired information into the **begins with** field. Enter "**Nashville**".
122.	Click the **Look Up** button. Look Up
123.	Click "**Nashville DAVIDSON, TENNESSEE**". Nashville DAVIDSON, TENNESSEE

Step	Action
124.	Now you will choose the destination location of the return trip. Click the **Location Code** button.
125.	Click the **Search by** list. Location Code
126.	Click "**Description**". Description
127.	Click in the **begins with** field.
128.	Enter the desired information into the **begins with** field. Enter "**Memphis**".
129.	Click the **Look Up** button. Look Up
130.	Click "**Memphis, SHELBY, TENNESSEE**". Memphis SHELBY, TENNESSEE
131.	Notice the **Miles** have been populated. This amount will be used to calculate the mileage costs.
132.	Click the **OK** button. OK

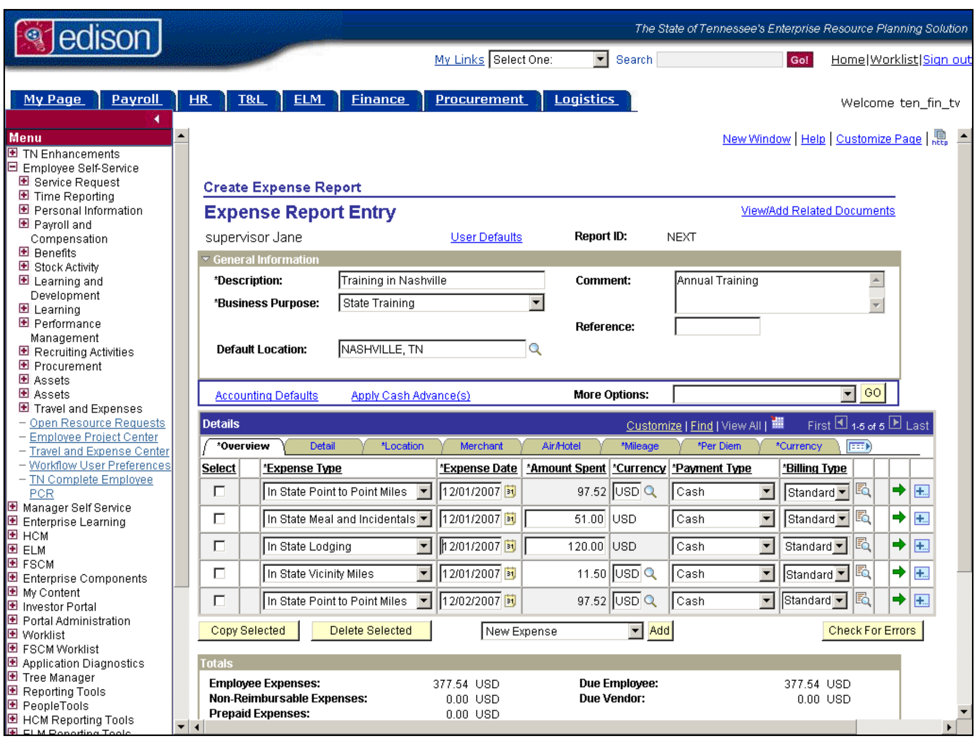


Step	Action
133.	You will need to enter additional details about the mileage expense. Click the **Detail** tab. 
134.	Use the **Description** field to enter free form text related to the expense line. Click in the **Description** field. 
135.	Enter the desired information into the **Description** field. Enter "**Mileage from Nashville to Memphis**".
136.	Click the **Overview** tab. 
137.	Click the **Check for Errors** button to check the expense transaction line(s) for missing or invalid information. Click the **Check For Errors** button. 
138.	Notice the system displayed a red flag next to the expense line where an error was found. **Note:** This is called the **Missing or invalid information** field.

Step	Action
139.	Click the **red flag** displayed next to the expense type with the error.
140.	Use the **Expense Detail** page to view and correct missing or invalid information on expense transaction lines. The error is described at the top of the page.
141.	Review the error. In this example, you entered an amount over the CONUS rate of 107.00. You are instructed to provide more information. **Note**: The system will direct you to the fields that need further information. Look for the red highlighted areas under the **About this Expense** section.

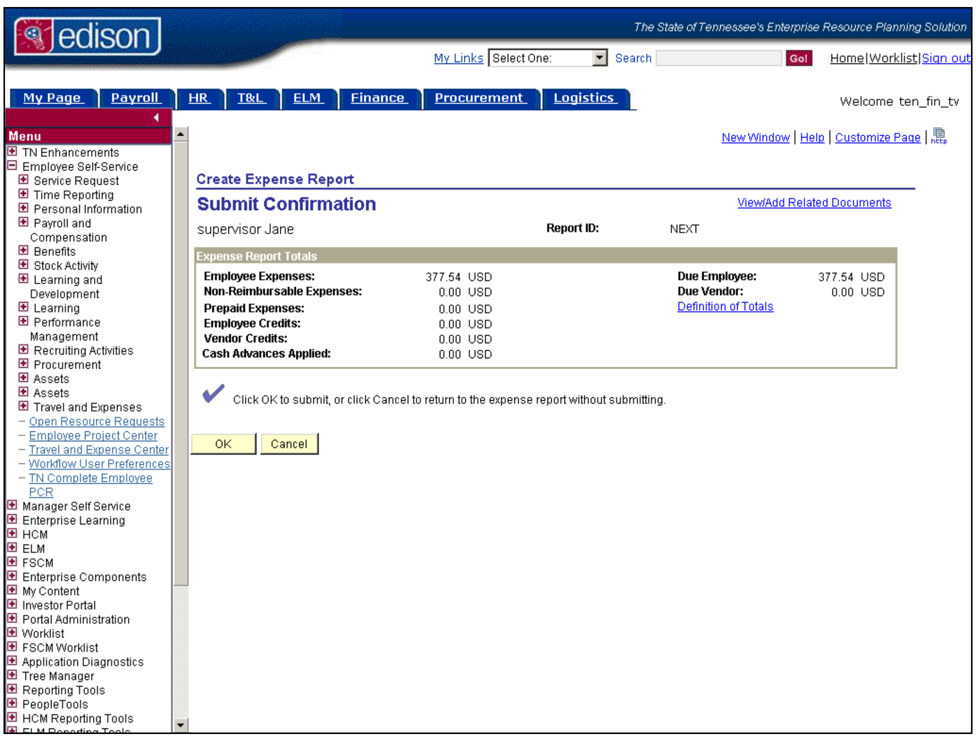


Step	Action
142.	Use the **Location Amount** field under **Exception Comments** to provide the reason why you exceeded the per diem rate. Click in the **Location Amount** field.
143.	Enter the desired information into the **Location Amount** field. Enter "**Could not locate hotel with vacancies at per diem rate. This amount was approved on TA1234567891**".
144.	Your approver will review the comments you enter and either approve or deny the expense report.
145.	Click the navigation bar to scroll to the bottom of the page.
146.	Click the **Return to Expense Report** link. Return to Expense Report
147.	Notice the red flag is no longer next to the expense line. This indicates that you can submit the expense report for approval.



Step	Action
148.	Click the navigation bar to scroll to the bottom of the page.

Step	Action
149.	Click the **Save for Later** button to save the expense report without submitting it for approval. You can save the report with or without invalid or missing information, and you can modify it later. Click the **Submit** button to save the expense report and submit it for approval. After you submit the expense report, you cannot modify it unless an approver returns it to you.
150.	In this example, you are ready to submit the expense report to your approver. Click the **Submit** button. Submit



Step	Action
151.	Click the **OK** button. OK
152.	Notice the **Report ID**. You can use this number to identify the expense report in **Edison**. This number is assigned to an expense report after being saved or submitted.

Step	Action
153.	You have successfully completed **Creating an Expense Report**. **End of Procedure.**

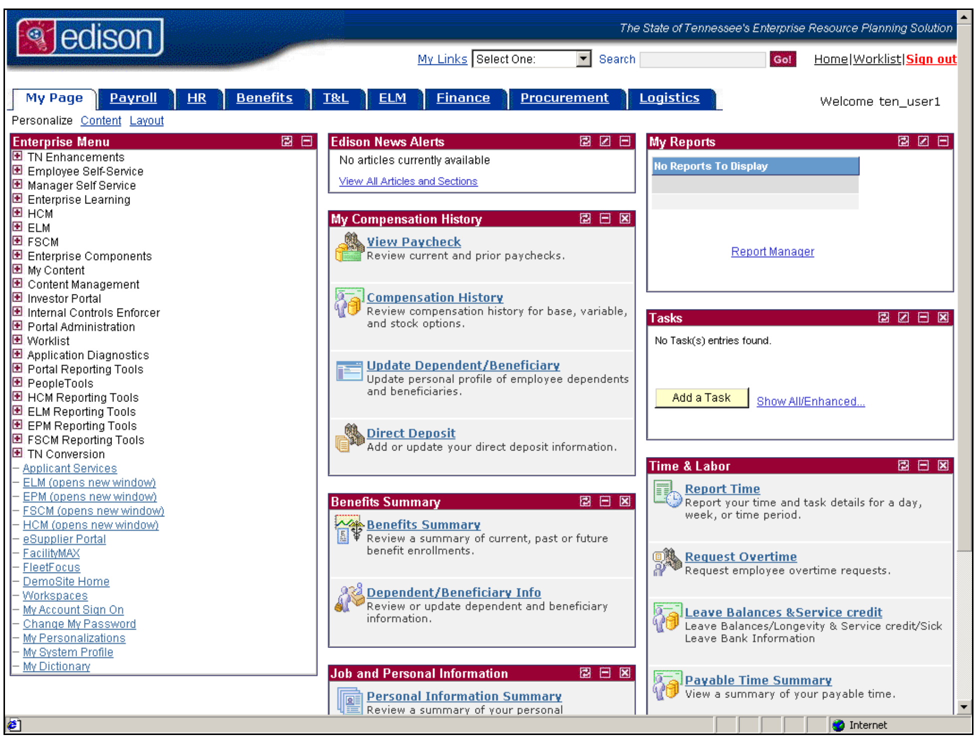
Expense Report - Modify

You can **Modify an Expense Report** if you have previously saved it, but not submitted it for approval or if an approver returned it for revision or correction.

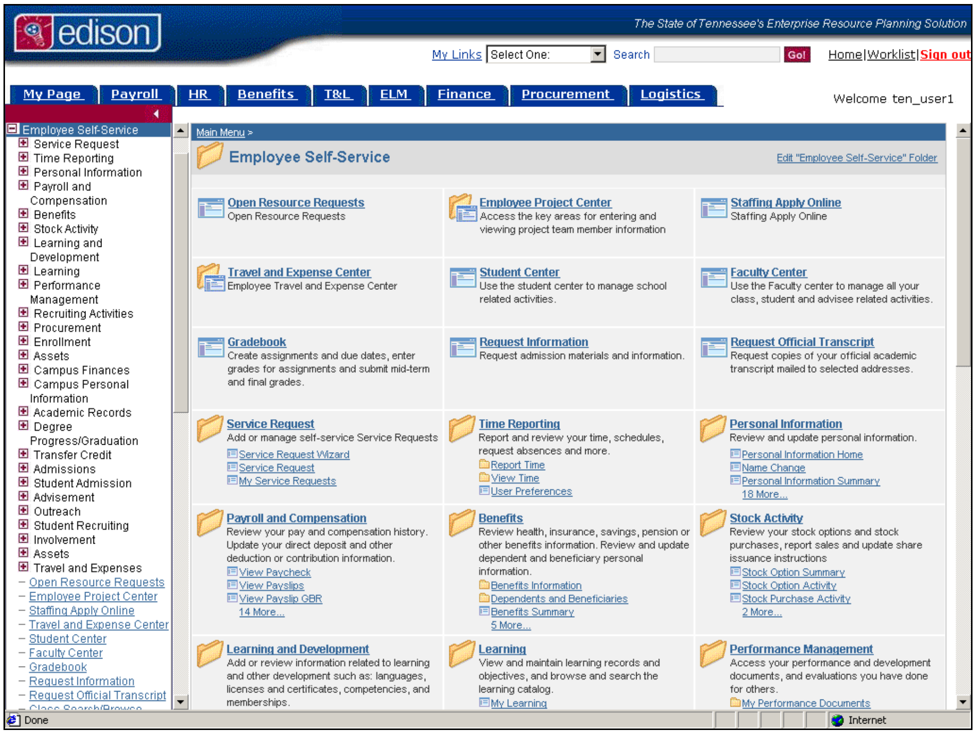
Procedure

Imagine you are employee John User. You have saved an expense report for training in Nashville. You have forgotten to decrease your per diem for meals and incidentals by 75% on the last day of travel.

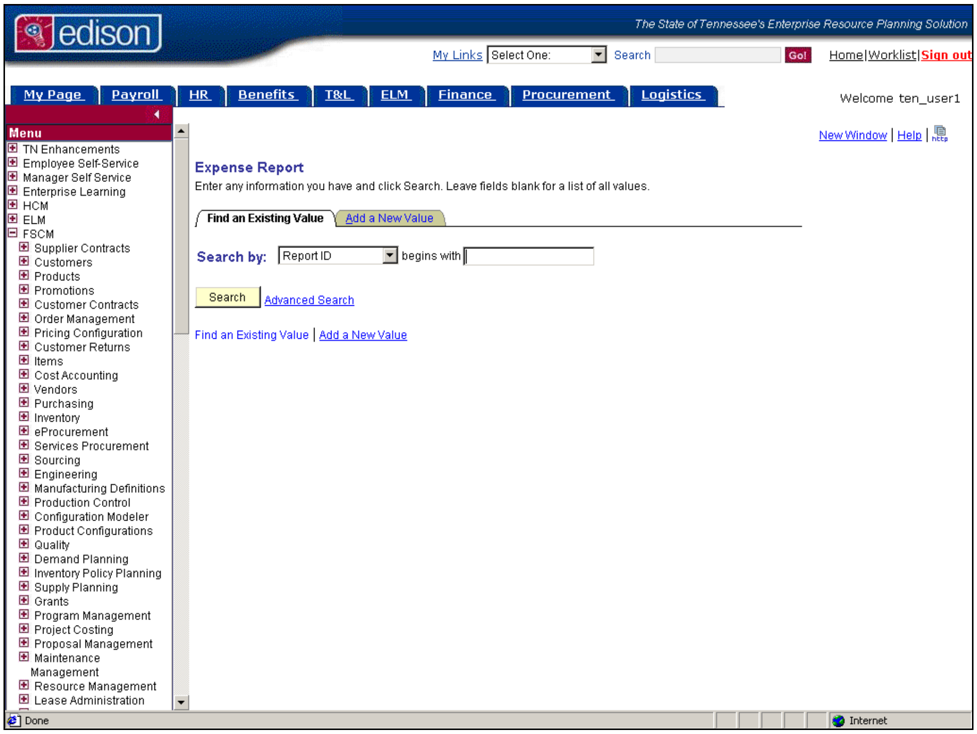
You wish to modify the expense report before it is reviewed by the approver.

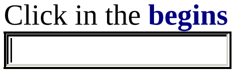
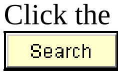


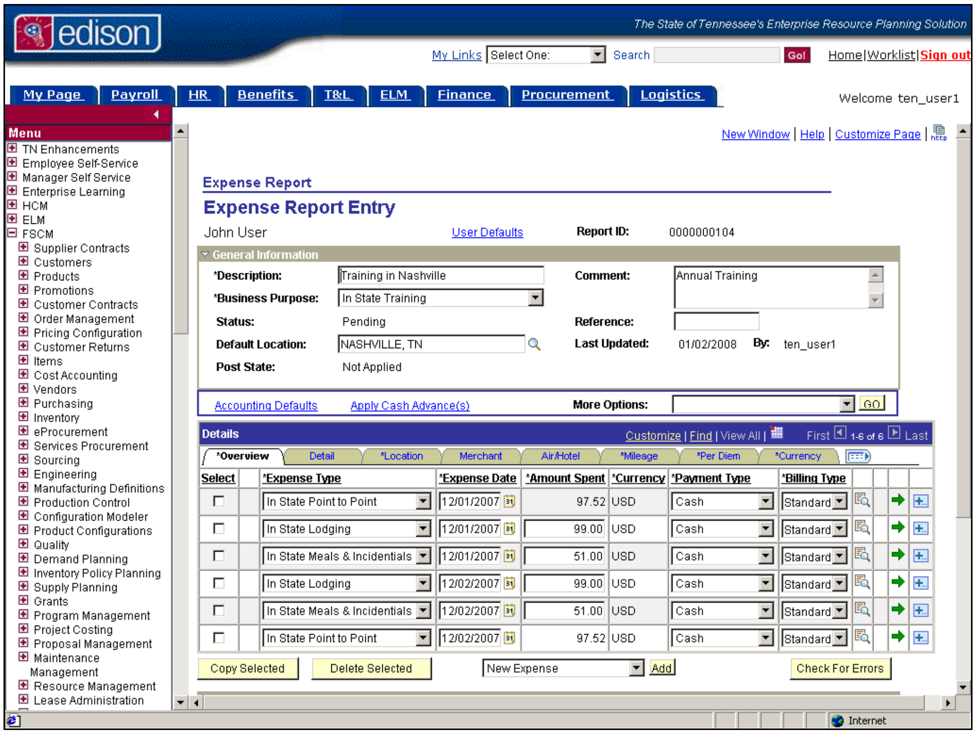
Step	Action
1.	Click the **Employee Self-Service** link. Employee Self-Service

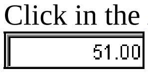


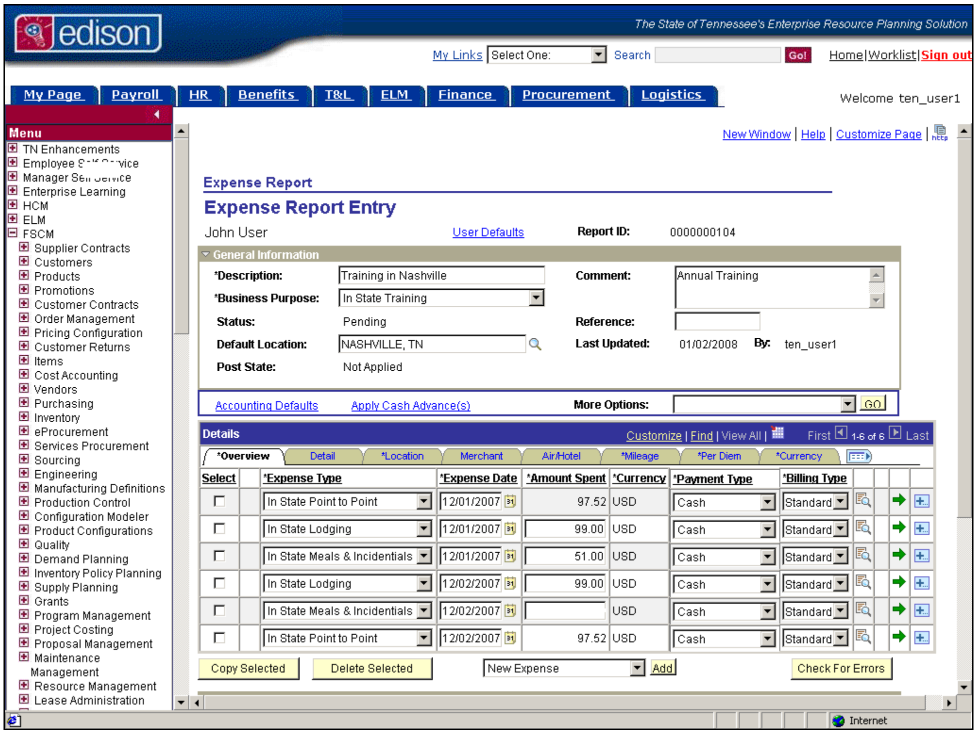
Step	Action
2.	Click the **Travel and Expense Center** link. Travel and Expense Center
3.	Click the **Expense Report** link. Expense Report
4.	Click the **Modify** link. Modify
5.	To modify an **Expense Report**, the system will return to the same page where you enter a new **Expense Report**. However, this time you will choose to **Find an Existing Value** instead of creating a new one.
6.	You can search for an expense report by using criteria such as **Creation Date, Empl ID, Name, Report Description, ID or Status**. In the example, you will search by **Report ID**.



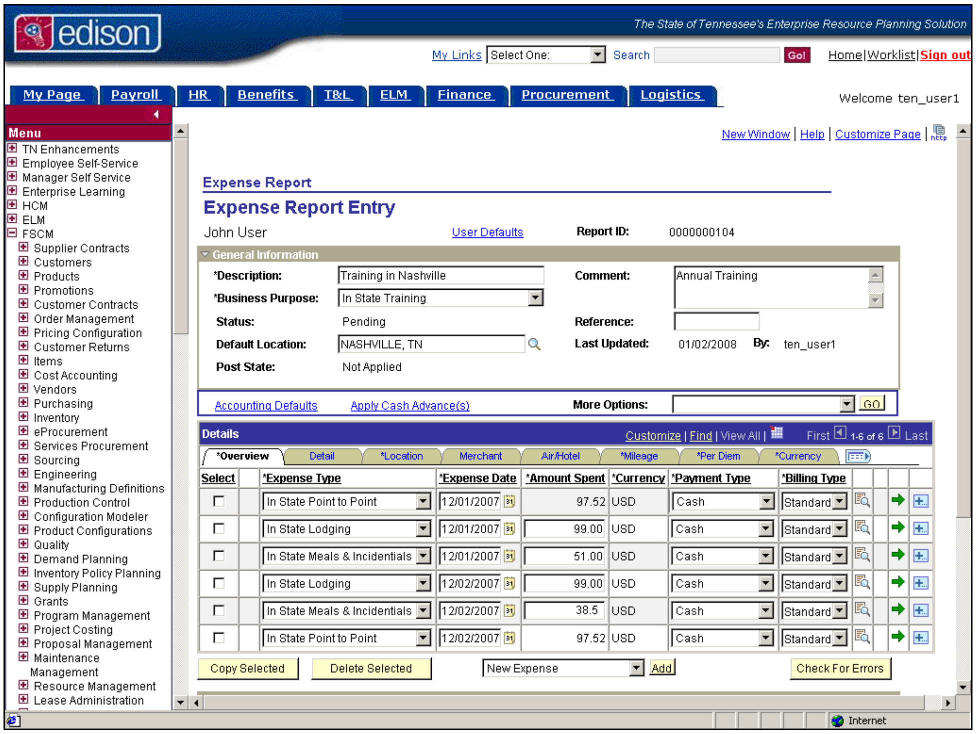
Step	Action
7.	Click in the **begins with** field. 
8.	Enter the desired information into the **begins with** field. Enter "**0000000104**".
9.	Click the **Search** button. 
10.	You will use the **Expense Report Entry** page to modify expense reports that have not been sent for approval or for reports that have been returned for revision. Notice you can edit select fields on the page.
11.	This expense report was sent back because the per diem per day for the last day was too high. **Note**: Per State policy, the last day of travel only 75% of the per diem for meals and incidentals can be claimed.

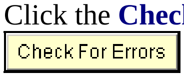
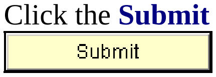


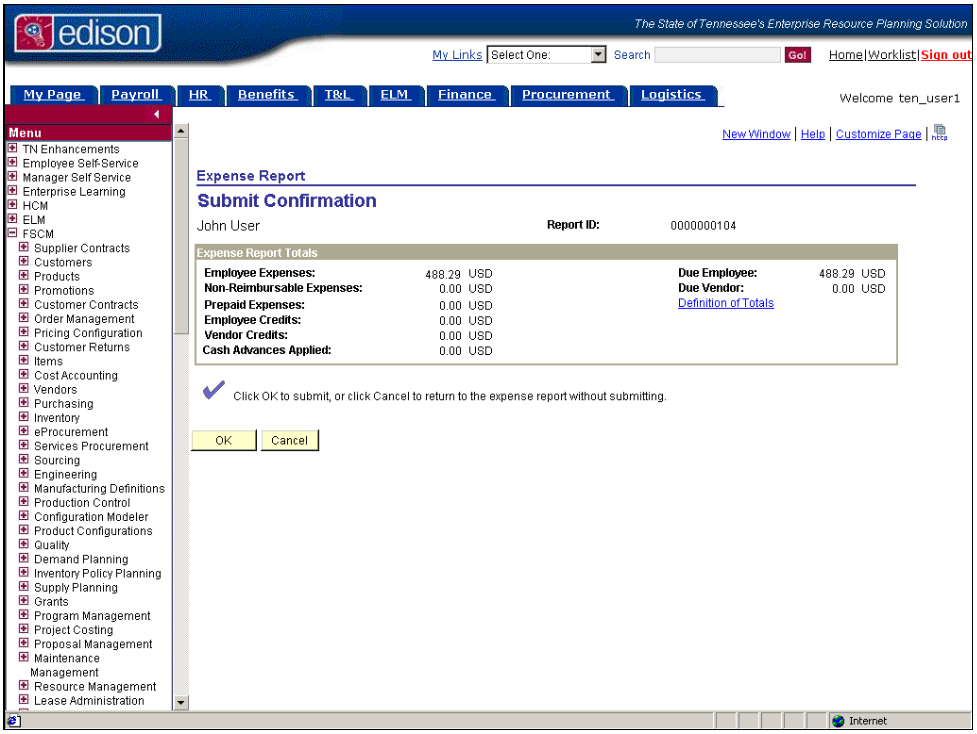
Step	Action
12.	Click in the **Amount Spent** field. 



Step	Action
13.	Enter the desired information in the Amount Spent field. Enter "**38.5**".



Step	Action
14.	Once you have completed the modifications, click the **Check for Errors** button to check the expense transaction lines for missing or invalid information. Click the **Check For Errors** button. 
15.	Notice the system did not produce any flags indicating an error or warning. If there had been an error, the expense line with an error would have been flagged.
16.	Click the navigation bar to scroll to the bottom of the page.
17.	You are ready to submit the expense report for approval. Click the **Submit** button. 



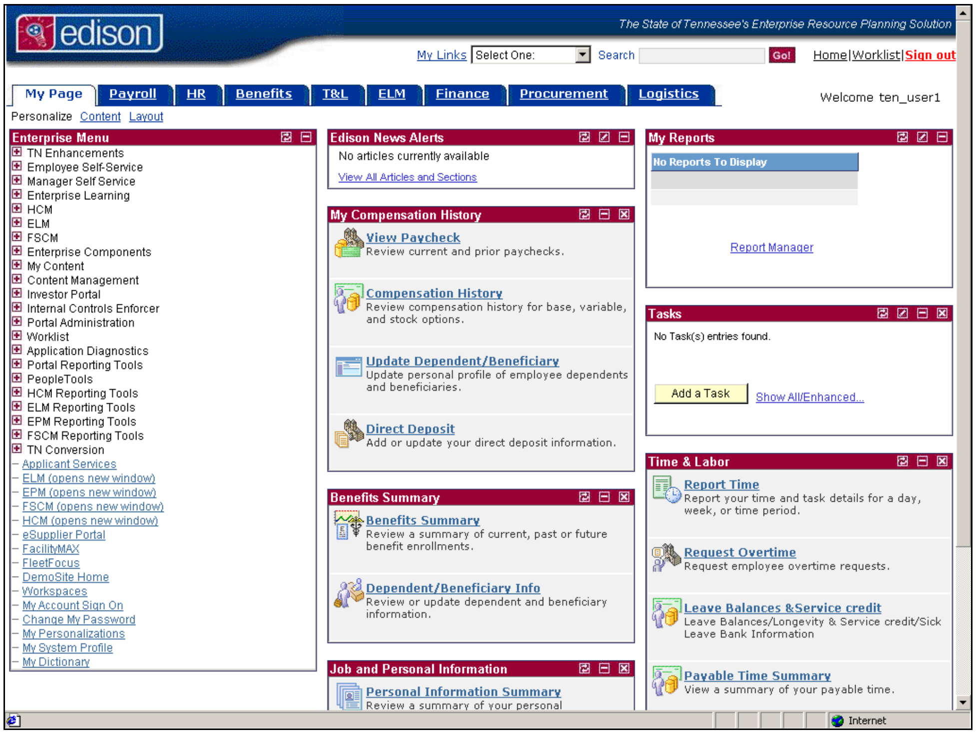
Step	Action
18.	Click the **OK** button. OK
19.	You have successfully **Modified an Expense Report**. **End of Procedure.**

Expense Report - View

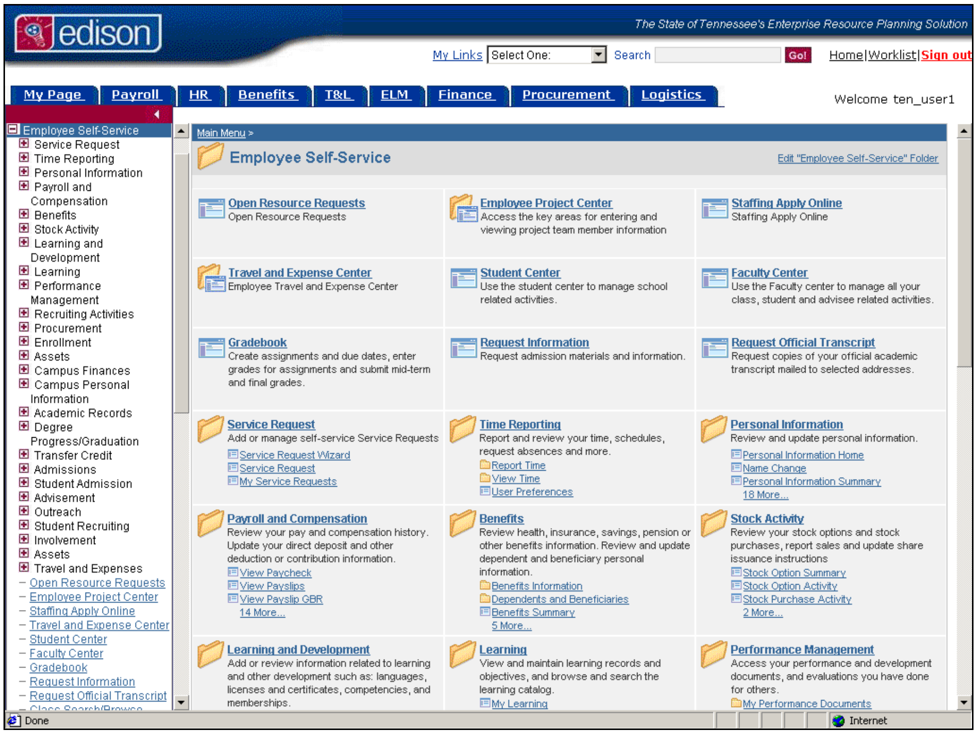
Edison displays the Expense Report Detail page in read-only mode when using the **View** option. After you submit an expense report for approval, you can only view it. You can view expense reports with these statuses: Approved, Closed, Denied, In Process, Paid, Pending, Submitted, and On Hold.

Procedure

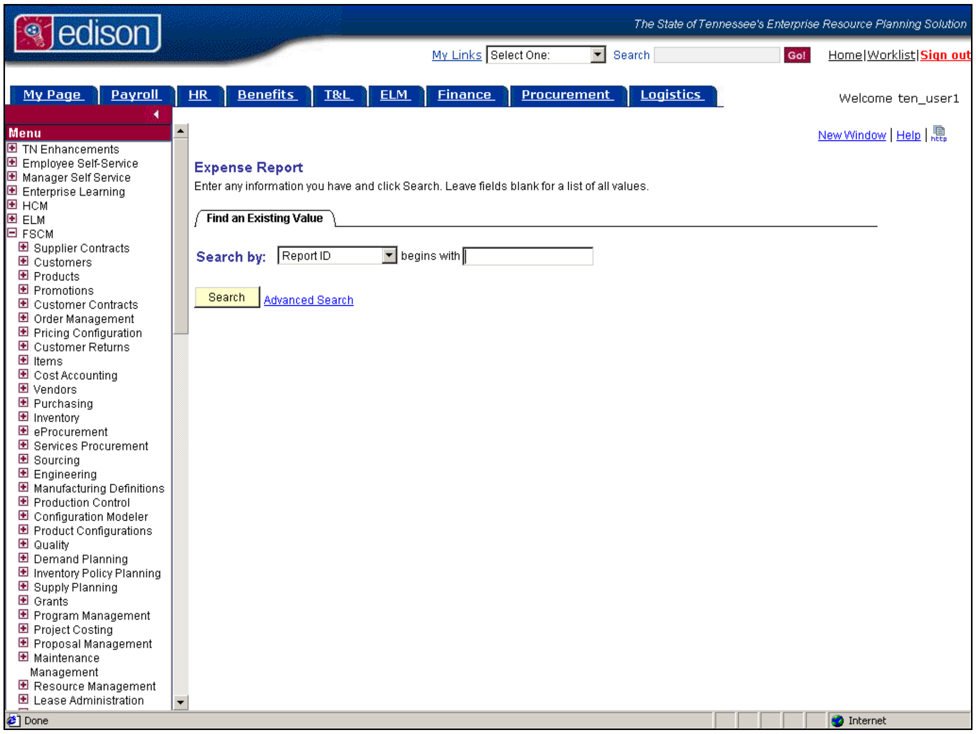
Imagine you are employee John User. You would like to view a past expense report and its status.



Step	Action
1.	Click the **Employee Self-Service** link. Employee Self-Service

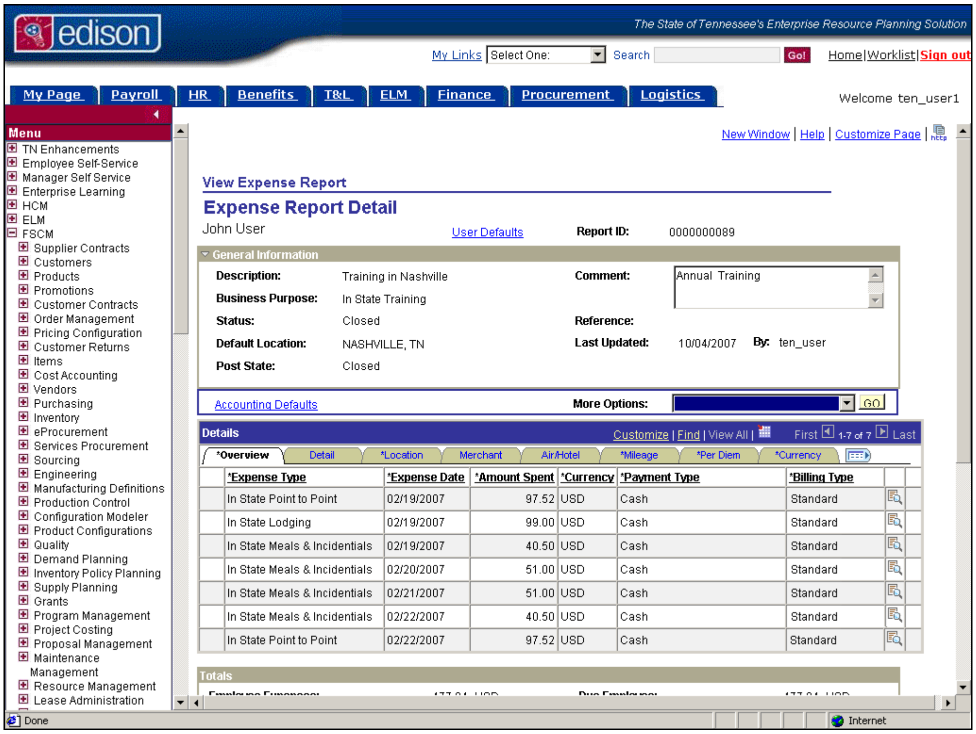


Step	Action
2.	Click the **Travel and Expense Center** link. Travel and Expense Center
3.	Click the **Expense Report** link. Expense Report
4.	Click the **View** link. View
5.	You can use the **Find an Existing Value** page to locate an expense report that already exists in the system. You can search for an expense report by using criteria such as **Creation Date, Empl ID, Name, Report Description, ID** or **Status**.
6.	You have the option to use the **Advanced Search** option to narrow the results down by multiple criteria. In the example, you will perform a standard search by **Report ID**.



Step	Action
7.	Click in the **begins with** field.
8.	Enter the desired information into the **begins with** field. Enter "**0000000089**".
9.	Click the **Search** button. 
10.	The **Expense Report Detail** page provides information about the requested report. This page is read-only and cannot be modified.
11.	Notice the **Report ID**. This number identifies the **Expense Report** in the system. You can use this number for tracking of the report.
12.	The **General Information** section displays general travel information the employee provided when the expense report was created.

Step	Action
13.	There are several **Status** values that can be assigned to an expense report, including: **Approved for Payment**: Expense Report is authorized for payment processing. **Closed:** Expense Report is marked for closure. Expense reports can be closed if they have been submitted and approved for payment processing, but are not yet staged for payment. **Denied**: Expense Report was not approved by the approver or auditor. **In Process**: Expense Report has been approved by someone on the approval list.
14.	Other **Status** values include: **Paid**: Employee has been issued a reimbursement. **Pending**: Employee has not submitted the expense report, or the approver denied and returned the expense report to the employee. This is the default status for a newly created expense report. **Staged**: Expense report is staged for payment. **Submitted for Approval**: The expense report is ready for the approval process.
15.	Notice the **Status Field** indicates the expense report is **Closed**.
16.	The **Post State** field displays whether accounting entries for the expense report have been posted to the general ledger. Notice the **Post State** is **Closed**. This indicates that report **0000000089** has been posted to the general ledger.
17.	The **Details** section displays the expense lines the employee entered.
18.	The tabs located in the **Details** section are used to provide additional information about the expenses.



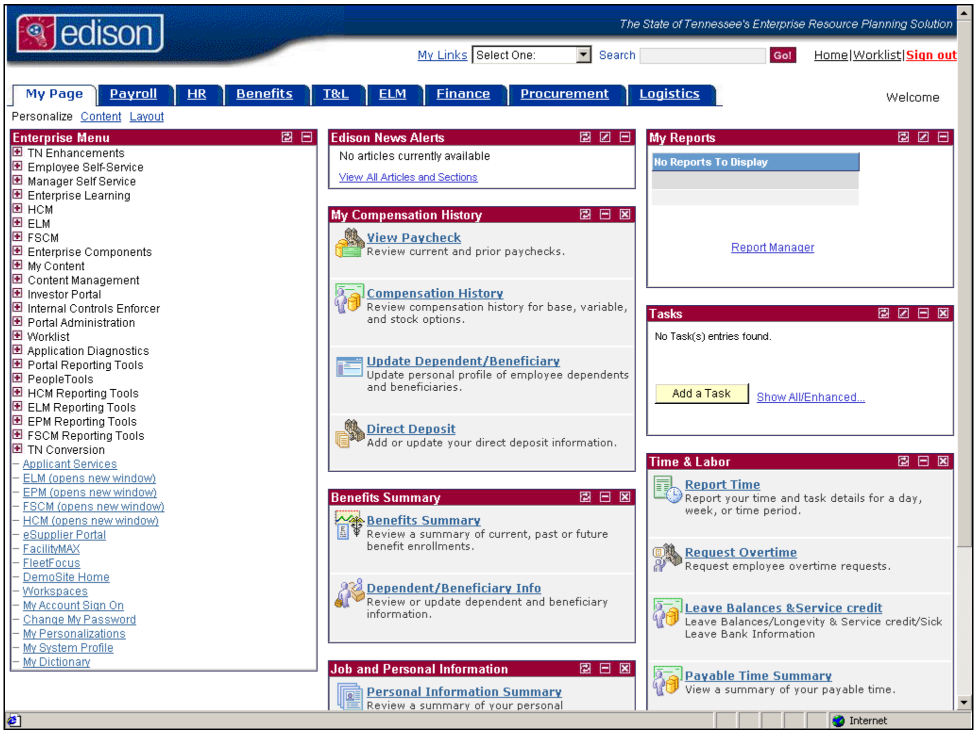
Step	Action
19.	Click the navigation bar to scroll to the bottom of the page.
20.	Use the **Totals** section to view the totals of the expense lines.
21.	View the history of the expense report in the **Action History** section. This section can be used to monitor the approval process.
22.	You have successfully **Viewed an Expense Report**. **End of Procedure.**

Expense Transaction History - View

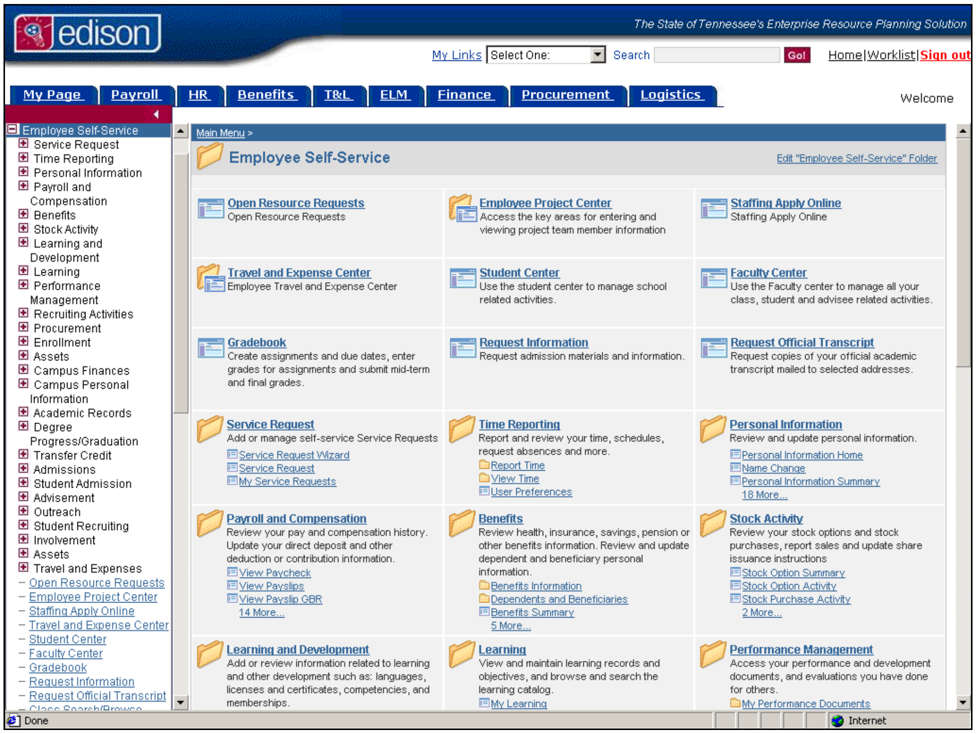
Employees can use the **Employee Expense History** page to view their expense transactions for travel authorizations, cash advances, and expense reports.

Procedure

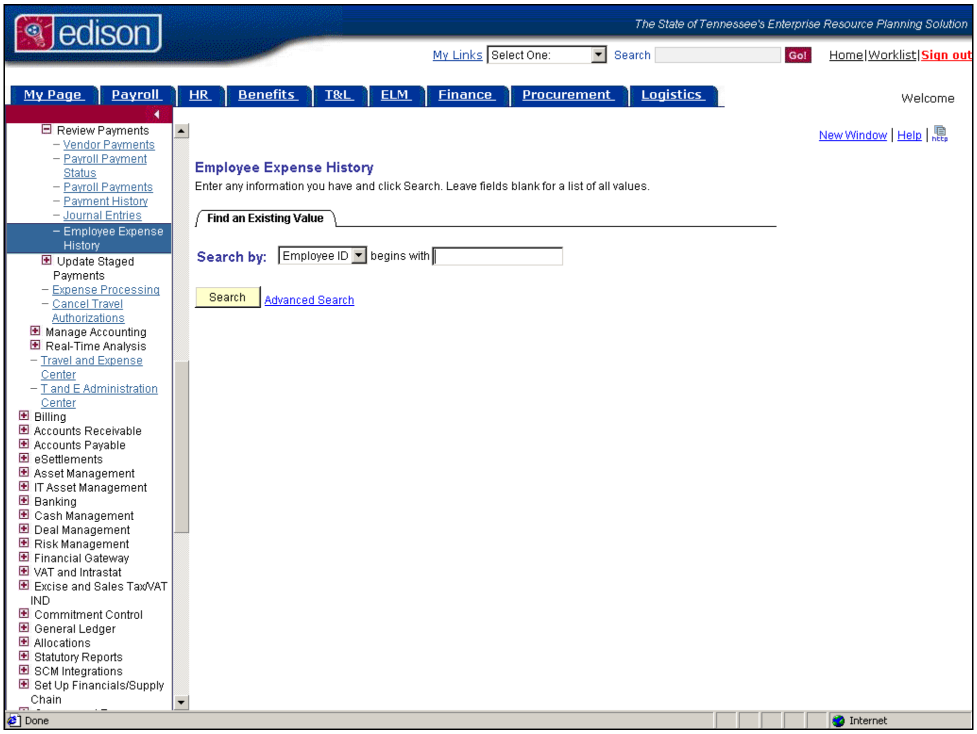
Imagine you are employee John User. You need information for your records from a past Expense Report. You can navigate to this information by viewing your Expense Transaction History.

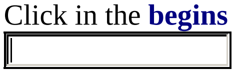
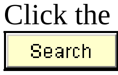


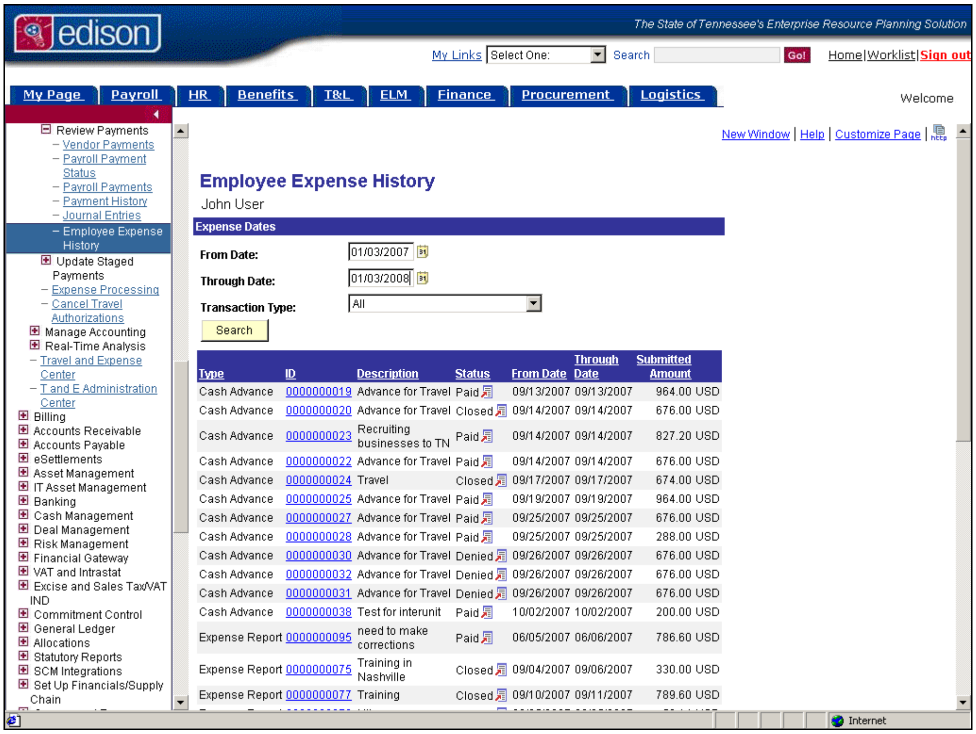
Step	Action
1.	Click the **Employee Self-Service** link. Employee Self-Service



Step	Action
2.	Click the **Travel and Expense Center** link. Travel and Expense Center
3.	Click the **Review Payments** link. Review Payments
4.	Click the **Review Expense History** link. Review Expense History
5.	You can use the **Find an Existing Value** page to locate your expense history. You can search for your records by **EmplID** or **Name**. **Note**: **Empl ID**= Employee ID. In the example, you will search by **EmplID**.

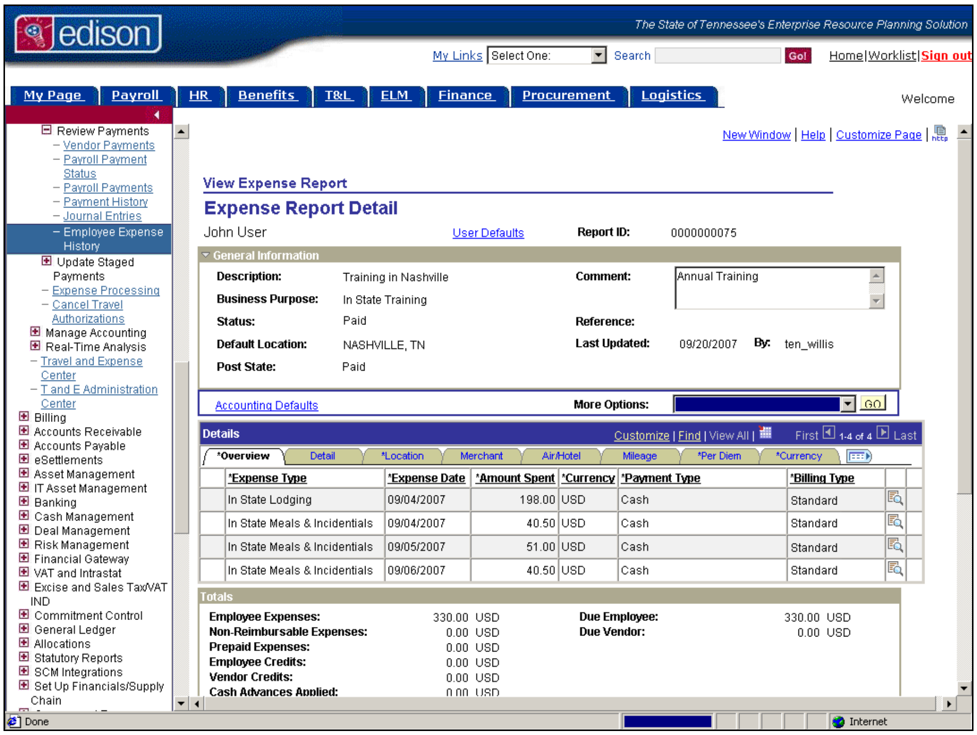


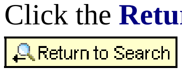
Step	Action
6.	Click in the **begins with** field. 
7.	Enter the desired information into the **begins with** field. Enter "**00327936**".
8.	Click the **Search** button. 
9.	Use the **Employee Expense History** page to view expense transactions for travel authorizations, cash advances, and expense reports.
10.	Use the **Expense Dates** field to enter relevant date criteria.
11.	The **Transaction Type** view defaults to all types, but you can narrow the search to view only specific types. The **Transaction Type** options are: **All**, **Cash Advances**, **Expense Reports**, or **Travel Authorizations**.
12.	Notice the **Transaction Type** is currently selected as **All**. By selecting **All**, you can view all cash advances, expense reports and travel authorizations that are on your record.



Step	Action
13.	In this example, you wish to view only **Expense Reports**. Click the **Transaction Type** list. All
14.	Click "**Expense Reports**". Expense Reports
15.	Click the **Search** button. Search
16.	Notice the system now only displays **Expense Reports**. If you chose travel authorizations as the **Transaction Type**, the system would only display travel authorizations. Other information (**ID, Description, Status, From/Through Date and Submitted Amount**) is provided to help you select the correct **Expense Report** to view.
17.	Click a report ID link in the **ID** column to open the expense document. Click "**0000000075**". 0000000075
18.	You can use the **Expense Report Detail** page to review information related to the **Expense Report**.

Step	Action
19.	The **General Information** section displays general travel information the employee provided when the expense report was created.
20.	The **Details** section displays line information from the **Expense Report**.



Step	Action
21.	Click the navigation bar to scroll to the bottom of the page to view additional information.
22.	You can view the history of the **Expense Report** in the **Action History** section.
23.	Click the **Return to Search** button. 
24.	You have successfully viewed an **Employee's Expense Transaction History**. **End of Procedure.**

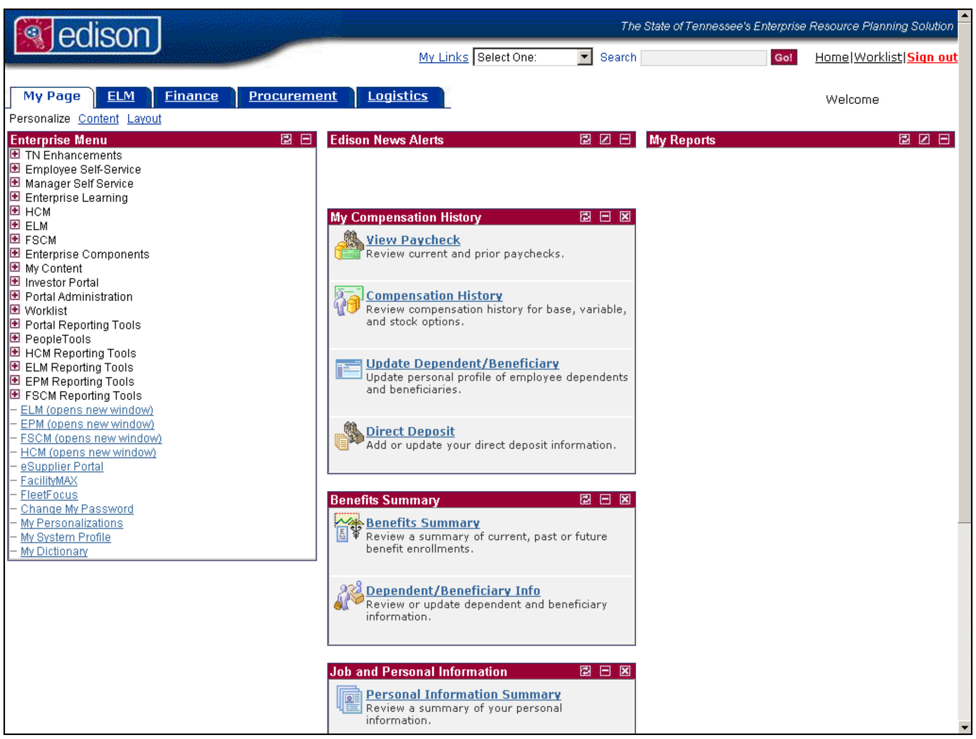
Reserve a State Car

Use the FleetFocus Motor Pool Reservation process to create a car reservation for approval. Employees should only reserve a car when their travel has been approved. Car reservations can be made up to 10 days in advance of pickup day (counting weekends) without special approval. Within this 10 day period, you can make a reservation up to the last minute, however it is strongly recommended that you provide more notice. Employees wishing to reserve a State car between 10 and 29 days in advance must submit a request to their appropriate supervisor. Employees wishing to reserve a State car 30 or more days in advance must submit a request to the Commissioners office for approval.

KEY NOTE:
•Account numbers, which are used to designate the account the car rental should be billed to, can be obtained by contacting your appropriate Fiscal Office. The Account Number in FleetFocus is the same as the speed chart and should not be confused with the Account chartfield.
• The first two digits of account numbers are department specific.

Procedure

In this lesson, you will reserve a State vehicle for John Maybe.

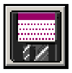


Step	Action
1.	Click the **FleetFocus** link. FleetFocus

Step	Action
2.	Enter the desired information into the **User name** field. Enter "**JohnUser**".
3.	Enter the desired information into the **Password** field. Enter "**training**".
4.	Click the **Continue** button. Continue
5.	The locations listed are dispatch locations and you should always select the location where the car is normally picked up. For example: a pooled dispatch or a MVM dispatch location.
6.	Click the scrollbar.
7.	Click the **M1000 - FLEET MAINTENANCE GARAGE** list item.
8.	Click the **Motor Pool** menu item. Motor Pool
9.	Click the **Reservation** link. Reservation
10.	Click the **New Ticket** button. New Ticket

Step	Action
11.	Click in the **Date/Time:** field. **Note**: This field is required.
12.	Click the **Calendar** icon button.
13.	Click on the **Return** day. 14
14.	Click in the **Time** field. 11:13:55
15.	Enter the desired information into the **Time** field. Enter "**09:00**" **Note:** Time must be entered using the Military format (24 hour clock). example: 15:00 = 3:00pm
16.	Car reservations can be made up to 10 days in advance of pickup day (counting weekends) without special approval. Within this 10 day period, you can make a reservation up to the last minute, however it is strongly recommended that you provide more notice. Employees wishing to reserve a State car between 10 and 29 days in advance must submit a request to the appropriate supervisor. Employees wishing to reserve a State car 30 or more days in advance must submit a request to the Commissioners office for approval.
17.	Click the **OK** button. OK
18.	The **Rental Class** identifies the type of vehicle the employee is requesting.
19.	Click the **Rental Class:** list.
20.	Click the **MIDSIZE SPORT UTILITY** list item. MIDSIZE SPORT UTILITY
21.	Double-click in the **Reserved For:** field.
22.	Double-click **Employee ID: 1236499 - John Maybe** 01236499
23.	The **Department** will default in based on the department that you are assigned on your employee record. This will not have to be selected.

Step	Action
24.	Click in the **Phone No.:** field.
25.	Enter the desired information into the **Phone No.:** field. **Note:** Telephone number must include the area code. Enter "**(615)555-1212**"
26.	Press **[Tab]**.
27.	Enter the desired information into the **Destination:** field. Enter "**Knoxville, TN**".
28.	Enter the desired information into the **Requested By:** field. Enter "**JOHN USER**".
29.	Enter the desired information into the **Reason:** field. Enter "**Conference**"
30.	Press **[Tab]**.
31.	The **Ref No.:** field should be used to enter your Travel Authorization (TA) number
32.	Account Numbers (speedcharts) are used to designate the account the car rental should be billed to. It can be obtained by contacting your appropriate Fiscal Office. The first two digits of account numbers are department specific. **Note**: Account Numbers (speedcharts) can be modified any time prior to the request being posted for Billing.
33.	Double-click in the **Account No.:** field.
34.	Click in the **Account Number** field.
35.	Enter the desired information into the **Account Number** field. Enter "**PO**". **Note**: In FleetFocus the format for Account Numbers does not match the format used in this example.
36.	Click the **Search** button. Search
37.	Notice the system returns all the direct account numbers for department '**PO**'. This list may be short or long depending on the department selected.
38.	Double-click the "**PO00000005**" list item. PO00000005
39.	The **Notes** section should be used to document any pertinent information related to the car reservation request (**i.e.**, if a group of employees will be riding together in one car).

Step	Action
40.	Click the **Save** icon button. 
41.	Once the Motor Pool Reservation has been saved, note the **MP Ticket No:** is **264** and the **Status:** is **Reserved**. **Note**: Although the status updates to Reserved upon saving the reservation request, it is not confirmed until the supervisor has approved the request. This status functions as Reserved, pending approval.
42.	Although the reservation has been requested, it must be approved by the appropriate supervisor.
43.	You have successfully **Reserved a State Car**. What MVM requires in order to pick up cars: an approved reservation, a valid drivers license and your State ID. **End of Procedure.**